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ABSTRACT

The Education Management Information Exchange (EMIE) provides selected information on educational management to the professional staffs of local education agencies in England and Wales. The range of services provided by EMIE was developed by examining the needs of local agencies, planning ways of meeting those needs, and testing the resulting services with local agency cooperation. Notable characteristics of EMIE include the selectivity of its computerized information collection, its focus on policy and practice, and its stress on providing access to and obtaining information, in addition to printed and other materials, from key contact people in local agencies. Five methods are used to provide information to service clients: abstracts bulletins, responses to individual inquiries, occasional papers on critical themes, briefing papers and newsletters prepared on request, and papers and listings on popular inquiry topics. The first part of this report describes EMIE and its growth since 1981 and discusses and makes recommendations regarding the various services it offers. The second part reviews EMIE's other activities, including its fostering of professional involvement in its own activities, its relationship with the Society of Education Officers and other agencies, its funding, its public relations efforts, and its governance. (PGD)

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EMIE

Final Report

David Streatfield
Sue Taylor

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Education Management Information Exchange

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Education Management Information Exchange
The Mere
Upton Park
Slough
Berkshire SL1 2DQ

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The Appendices to this report are available as a separate volume.

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A particular word of thanks is offered to Derek Foreman, Head of Accounts Branch, ILEA and to Eddie Lewis, formerly the Administrative Officer at SEO, for almost becoming full-time members of the Project team at various times.

INTRODUCTION

The Education Management Information Exchange (EMIE) Project was launched in January 1981 as a four-year research project funded by the Department of Education and Science and the National Foundation for Educational Research and sponsored by these two bodies and the Society of Education Officers. When the Welsh LEAs officially joined the system in June 1983, the Welsh Office began to contribute to the main project grant. The EMIE Project focussed on the use made of information by education officers in order to develop a range of experimental information services aimed primarily at professional staff of LEAs in England (and later Wales).

After a six-month exploratory phase which involved the Project Head in observing staff at work, sitting in at senior management (officer) meetings and numerous discussions with education officers, a short period of planning was followed by a six-month experimental phase in which 30 LEAs cooperated with EMIE in testing several information services. The EMIE service was then opened to all LEAs in England in April 1982. A range of information services has been developed by EMIE staff with the full support of the Consultants and the EMIE link people. These services are described in Part One.

Various opportunities were taken to work directly with education officers. EMIE staff became involved in management training activities of the Society of Education Officers and provided various forms of information support for SEO committees. These initiatives are described in section 9.

The EMIE staff and Consultants during the period of this report were:

Principal Project Adviser:
    Mr. G.V. Cooke
Project Head:
    Mr. D.R. Streatfield (90% from January 1981; 60% from April 1984)
Senior Research Officer:
    Ms. S. Thompson (later Taylor)(appointed June 1981)
Information Development Officer:
    Mr. J. Griffiths (50%, appointed June 1984)
Project Secretary:
    Miss C. Jackson (March 1981 - April 1982)
    Mrs. M. Froud (June 1982 - February 1984)
    Mrs. J. Robertson (appointed April 1984)
Clerical Assistant:
    Mrs. M. McIntosh (57%, appointed January 1984)
Temporary Assistant:
    Mrs. J. Foskett (February - March 1983)

Consultants:

- Mr. F. Adams, formerly Director of Education, South Glamorgan (appointed September 1983)
- Mr. D. Coatesworth, formerly County Education Officer, Norfolk (September 1981 - August 1983)
- Mr. J. Hudson, formerly Deputy Under-Secretary of State at the DES (appointed September 1981)
- Mr. M. Johnson, formerly Director of Education, Harrow (appointed January 1984)
- Mr. B. Kay, formerly Chief Inspector, HMI (appointed September 1981)
- Mr. J. Revell, formerly Director of Education, Croydon (September 1981 - August 1983)
- Miss M. Sproat, formerly Director of Education, Gateshead (appointed September 1981).

PART ONE: INFORMATION SERVICES

1. AIMS; EARLY STAGES

1.1 The original aim of EMIE, broadly stated in the project description submitted to the Department of Education and Science in July 1980, was "to launch and develop a central system for the computerised storage, retrieval and exchange of 'quality-controlled' management information on educational policy and practice, primarily for use by local education authorities".

1.2 In developing a work programme, it has been necessary to balance the potentially conflicting demands of an information service, and a research and development project: testing, running and monitoring a number of basic information services, and at the same time, engaging in new activities designed to extend or enhance the 'established' services.

1.3 Fundamental to the design of the EMIE information services was the conviction that, in order to be successful, they must relate as closely as possible to the perceived needs of the primary 'target group' of education officers and advisers in LEAs, and should fit into their normal work pattern. Hence the early stages of the Project (from January 1981 until the national 'launch' in April 1982), concentrated on gaining an insight into the clients' needs and designing and testing some experimental services for use by a small group of 30 LEAs. Two methods used to give Project staff the necessary background knowledge were:

1.31 'Observation' work (see Appendix A, Implications of the observation work for the design of the EMIE services)

The Project Leader spent three one-week periods observing the work of three education officers in two LEAs, with the aim of identifying aspects of their work which might influence information service design. Some important characteristics noted were that education officers:

- are subjected to frequent interruptions and changes of topic;
- make little use of 'formal' information stores apart from department files;
- devote substantial amounts of time to scheduled meetings;
- dispose of most documents received in a very short time.

A simple but crucial conclusion drawn was that information prepared for circulation to LEAs should facilitate rapid scanning to pick out the main points.

1.32 Meetings with LEA link people

Thirty LEAs were invited to participate in the 'experimental' phase of the information service from October 1981 - March 1982, and all agreed to be involved. A 'link person' was nominated by each authority to act as the main 'communication link' with EMIE, and introductory meetings were held in October 1981. These meetings, and discussion with EMIE Consultants (see 2 below) enabled Project staff to formulate proposals for the initial phase of the information service (see Appendix B, Information services October 1981 - March 1982). It was envisaged that the three main 'strands' would be:

- newssheets giving abstracts of LEA documents, news of LEA initiatives, and notice of topics on which documentation needed to be collected;
- reviews or digests on particular themes; and
- an enquiry service.

2. STAFF; CONSULTANCY

The Project has a small staff, originally two full-time research officers (one of whom is principally responsible for the development and running of the information services) and a full-time secretary. This complement was later increased to include one part-time clerical assistant and (in June 1984) a half-time information officer. Throughout the Project's life, the research staff, whose previous work experience was largely in information service provision or research, rather than educational administration, have received valuable direction and assistance from a part-time Principal Adviser and five part-time Consultants, all of whom have retired from senior posts in the education service. At the outset, the functions of the Consultants were seen as:

- providing a measure of 'quality control' by assisting Project staff in assessing the value of information submitted;
- advising staff on the handling of particularly difficult enquiries;
- producing written material; and
- identifying good practice.

Appendix C (Review of the role of EMIE Consultants) presents the Consultants' own view of their work and of how their role has changed.

3. RESOURCES

3.1 From the beginning, the EMIE information service has relied on the use of a computer for storage and retrieval. It was felt that manual methods would not allow sufficiently rapid and flexible access to documents covering a wide range of policy areas, and the Project therefore purchased its own keyboard terminal and VDU, which were linked to the NFER's IBM 4331 computer, enabling on-line access to the EMIE files. The software package used for retrieval purposes is IBM STAIRS. In designing and maintaining their computer databases, EMIE staff have relied upon technical assistance from the NFER's Computing and Statistics Department.

3.2 LEAs have provided the main source of information for EMIE. However, it is clearly also necessary to have access to literature from other sources, and in this it has been valuable to be able to call upon the extensive bibliographical services of the NFER Library.

4. MONITORING AND EVALUATION

4.1 Monitoring and evaluating the information service has been a significant activity for the Project and has made considerable demands on staff time, both at professional and clerical level. It has been necessary for a number of reasons: firstly to fulfil the research objectives of the Project, by recording the response to various types of information provision attempted; secondly in providing the Project Steering Committee with regular progress reports; and thirdly, and perhaps most importantly, in enabling staff to improve services in the light of feedback from LEAs.

4.2 'Routine' monitoring has involved recording each information request and producing regular statistical reports, indicating for example the general pattern of use of the information services, the level of interest in individual subject areas, and the extent of LEA participation in EMIE. Enquirers are asked to return a reply postcard, noting whether they have found EMIE's response useful (see Appendix D). In addition, separate evaluations of the abstracts and enquiry services were undertaken (see Appendix E, Evaluation of education management abstracts no. 3, and Appendix F, Report on EMIE enquiry case studies). Both of these evaluations were based on telephone interviews with a sample of enquirers.

4.3 Three evaluation exercises have been conducted independently from the staff of the Project. An evaluation by 23 LEAs was organised by one of the EMIE Consultants, with the final report being written by an external editor, Deborah Greig (see Appendix G, LEA independent evaluation of EMIE); the Welsh authorities were asked to submit their own six-monthly 'qualitative' reports on EMIE to the Welsh Office; and Regional Committees of the Society of Education Officers were invited to give the Regional Societies' views about EMIE (see Appendix H). These exercises aimed to find out how LEAs regarded the success of the EMIE Project, taking into account the full range of its activities, but in doing so they have contributed useful comments on the information services (see 7 below).

5. FEATURES OF EMIE INFORMATION SERVICES

5.1 A number of features characterise the information service that has evolved from the original brief. EMIE:

- is based on a small, intensively-used information collection;
- does not aim to build a 'comprehensive' store of material, but rather to collect useful examples of LEA policy and practice on selected topics;
- uses contacts to supplement information found in documents;
- stores and retrieves information from a centralised computer database;
- obtains and disseminates information via a network of link people in LEAs;
- is primarily intended for use by education officers and advisers in LEAs, and restricts access to confidential documents;
- aims to provide a measure of quality-control and evaluation by using link people as a filter for LEA information, and by using experienced Consultants to review material.

5.2 The main 'thrust' of the information service has been to give practical assistance to education officers in their day to day work. Five principal methods of offering information have been developed:

- general and special abstracts bulletins, supported by a photocopying service (see Appendix I for an example of EMIE Education management abstracts);
- an individual enquiry service offering different levels of response according to need, ranging from bibliographical references or computer printout, to seeking new information from LEAs;
- occasional papers on priority themes by part-time Consultants (see Appendix J, EMIE publications April 1982

- October 1984 for individual titles);

- briefing papers or newsletters prepared on request for a specific audience. Papers have for example been requested by a Regional Society of Education Officers and by the SEO Industry Committee, and EMIE publishes the SEO Industry Committee's Newsletter;

- 'off-the-shelf' papers or listings on popular enquiry topics. For example, a survey on the administrative use of computers by LEAs was undertaken by the Project in conjunction with the SEO Industry Committee. As back-up to the final report (see Appendix K, Administrative use of computers by local education authorities) listings on computer applications of particular interest were prepared in order to respond to enquiries.

6. GROWTH IN USE OF THE INFORMATION SERVICES

6.1 After the initial experimental period, EMIE was launched as a national service in April 1982. The number of LEAs using the service grew until, by May 1983, only 11 authorities had not made use of the information exchange. By May 1984, this figure was reduced to one, and in September 1984 the Project was able to report that all LEAs had at some stage made use of the enquiry service and/or the abstracts service. Some had become frequent users: five LEAs had used EMIE more than 30 times; 12 had used it 21-30 times; and 42, between 10 and 20 times.

6.2 Table 1 (see page 7(a)) gives extracts from the regular statistical reports presented to the EMIE Steering Committee, indicating the pattern of use of the information services. Table 2 lists, in date order, EMIE publications likely to produce requests for information. Comparison of the dates in the two Tables explains, to a large extent, the fluctuations in the number of enquiries and abstracts requests and illustrates a pattern of 'supply and demand'. For example:

- the high figure for abstracts requests in the period May - October 1983 resulted from the issue of two bulletins, a 'general' abstracts bulletin and one devoted to the Education Act 1981.

- the high figure for enquiries in the period November 1983 - April 1984 includes the numerous requests for copies of the survey report on the administrative use of computers by LEAs, as well as requests for more detailed information based on the survey. The second SEO Industry Committee newsletter was also published in the same period, giving rise to a demand for material which it advertised. In addition to the role of publications,

Table 1. USE OF EMIE INFORMATION SERVICES

DATE	ENQUIRIES (EXCLUDING ABSTRACTS REQUESTS)	ABSTRACTS REQUESTS	DOCUMENTS SENT OUT IN RESPONSE TO ABSTRACTS REQUESTS	LEAS SUBMITTING ENQUIRIES/ABSTRACTS REQUESTS
April 82-October 82	112	68	324	71
ovember 82-April 83	157	153	886	83
May 83-October 83	158	256	1689	99
ovember 83-April 84	381	62	389	93
May 84-September 84	187	170	1036	88

Table 2. EMIE INFORMATION: PUBLICATION DATES

DATE	TITLE
April 1982	EMIE education management abstracts - 1
October 1982	EMIE education management abstracts - 2; Falling school rolls and the management of contraction: curriculum and staffing implications
March 1983	EMIE education management abstracts - 3
May 1983	SEO Industry Committee newsletter - 1
July 1983	EMIE education management abstracts - 4; Special education: Education Act 1981 - 1
November 1983	SEO Industry Committee newsletter - 2; Administrative use of computers by LEAs
March 1984	Special education: Education Act 1981 - 2
July 1984	EMIE education management abstracts - 5
August 1984	SEO Industry Committee newsletter - 3

three Open Days for EMIE link people, held in September 1983, may also have stimulated an increase in enquiries by extending awareness of EMIE.

- no new abstracts bulletin was issued between November 1983 and April 1984, hence the very low figure for abstracts requests in this period.

6.3 An important trend in LEAs' use of EMIE is the growing range of enquiry topics. EMIE began with a set of designated policy themes which were felt to be the key issues likely to interest LEAs (see 7.41 below). The scope of enquiries gradually widened to the point where the largest proportion of requests to EMIE was generated by topics other than the designated policy themes. The following list is given simply to illustrate the diversity:

- pre-school education
- local financial management schemes
- provision for ethnic minorities
- training of school governors
- management of school libraries
- equal opportunity and interviewing of teaching staff
- energy conservation schemes
- school health programmes
- pupil participation in the running of schools
- consultation on school buildings.

6.4 'Reply postcards' (see Appendix D) are routinely sent to enquirers together with replies to their requests. This method of monitoring is not expected to produce a high return, but the following figures give some indication of the level of satisfaction among enquirers who take the trouble to use the postcard. By the end of October 1984, 1059 numbered postcards had been distributed with EMIE information in response to requests and 357 of these had been returned, giving a response rate of 33.8%. Fourty-four cards were returned before the current system was introduced in November 1982, giving a total of 401 replies. The response categories were:

Very useful:	Useful:	Not useful:
240 (59.9%)	154 (38.4%)	7 (1.7%)

(Occasionally, respondents gave separate 'ratings' for each item supplied in response to an enquiry. In these instances, only the least favourable rating is recorded above.)

7. CONCLUSIONS AND RECOMMENDATIONS

7.1 Within the range of information work and other activities that EMIE has undertaken, the abstracts service is the most widely known to LEAs, with the enquiry service in second place, but generating an increasing demand as time goes on. To be effective, these services must of course aim for speed, relevance and accuracy. In addition, it is our view that EMIE should foster a degree of flexibility and diversity, if it is to sustain interest among LEAs. It needs flexibility, in order to be responsive to a variety of needs and capable of taking fresh approaches to information provision; and diversity, in order to be in touch with education officers across a wide range of interests. The Project's training and publications work, the information support offered to the SEO at national and regional level, and the assistance given to the LEA Research Group, have sometimes been labelled 'experimental'. This kind of 'experiment' has however contributed directly to the development of the 'basic' services, and indirectly to the increased awareness of EMIE among LEAs; without the means of testing and developing new areas of provision, an information service can quickly lose impetus - and the interest of clients.

7.2 Abstracts service

7.21 The evaluation report on EMIE education management abstracts (see Appendix E) gives an insight into what prompts requests for information from the bulletin and how enquirers use the documentation they select. LEAs find the service particularly helpful and it is heavily used. Its value lies for example in:

* saving time, by making a wide range of information available from a single source;

* drawing attention to likely pitfalls and providing a 'reference point' against which ideas can be checked;

* helping to crystallise thinking, particularly in the preparation of reports.

7.22 The effectiveness of the abstracts bulletin depends on a number of factors:

a. Content

In attempting to cater for 'wide general interest', it is inevitable that the effect may sometimes be 'hit and miss', since clearly, not all the policy areas covered can be of interest to all LEAs at the same time. However, this does underline the need for a regular intake of up to date information from LEAs, and for careful selection of the most useful material for inclusion in the bulletin. Success will obviously rest partly on the competence and experience of EMIE staff, but also on devising efficient methods of obtaining and evaluating new information. One of the Regional SEO

a. Content cont'd

reports on EMIE comments that "The problem for administrators is not, generally, that they do not have information at hand but rather that it is not in a format which can be rapidly assessed and assimilated". Some LEAs have therefore emphasised the need for EMIE abstracts bulletins to be more selective and concise.

b. Speed

There are several aspects to this, not all within EMIE's control. Bulletins need to be issued at reasonably frequent intervals in order to be as up to date as possible. The frequency usually suggested has been quarterly (though some officers have asked for bi-monthly bulletins). In practice the quarterly target has not been achieved because of staffing difficulties, particularly at times when there has been a heavy demand on the enquiry service, but it is expected that the June 1984 staffing increase will improve this.

Multiple copies of bulletins are despatched to LEAs, and these are circulated within the department. This practice, and the fact that some link people prefer to act as a channel for all requests to EMIE, does sometimes mean long delays for enquirers in receiving their information. This has to be weighed against the benefits of the link person being aware of the way colleagues use the service and having the opportunity to encourage feedback to EMIE.

The photocopying service which supports the abstracts bulletin has worked very efficiently and enquirers have often expressed appreciation for the speed of response.

c. 'Follow-up'

When responding to requests for documents from the abstracts bulletin, EMIE staff usually have no knowledge of the background to the request, and often do not know whether the material was found to be useful, as 'response' postcards are not always returned. The evaluation of the third issue of the abstracts bulletin was carried out in order to fill in some of the gaps in our knowledge about how the service is used and about the level of satisfaction. The bulletin is widely disseminated and many of those who use it may not be aware of the full range of services that EMIE provides, and hence may simply regard EMIE as a 'clearing house' for documentation. Better publicity would help, together with a more concerted effort to follow up abstracts requests, clarify clients' interests and ensure that the most appropriate information is provided.

7.3 Enquiry service

7.31 This service is the antithesis of the abstracts service in that it aims to provide a specialised response to questions from individual education officers and advisers, rather than something aiming to be of broad general interest. Responses are geared towards enquirers' particular needs: in some instances, the relevant policy information has already been collected on the EMIE database and names of contacts can also be given. Often, however, the information sought is not readily available; in such cases EMIE staff will approach a small number of LEAs (usually by telephone, using the link person as the first point of contact), and other relevant organisations, in order to produce an answer. This will take the form of a brief written or telephoned summary, ideally giving names of contacts with whom the enquirer can discuss the matter further.

7.32 Typically, enquirers contact EMIE when they need an indication of other LEAs' experiences, policy or practice in a given area. The following examples will serve to illustrate the form that questions - and answers - may take:

* LEA considering tertiary reorganisation, and wishing to know whether the introduction of tertiary colleges in other authorities has brought about a change in management structure within the education department.

EMIE's response includes a brief outline of administrative arrangements in three LEAs which have established, or are on the point of introducing, tertiary colleges; names of LEA contacts; and advice from one of the EMIE Consultants.

* assistant education officer in an authority which is considering the introduction of Halal meat into school meals provision, wishes to know about the approach adopted by other LEAs where this issue has been raised.

EMIE contacts five LEAs with ethnic minority school populations and is able to provide: an outline of how the school meals services are responding to this question, names of officers willing to discuss the matter further, and a document setting out one authority's position.

* LEA considering establishing a 'net budgeting' system for colleges of further education and wishes to contact other authorities with some form of financial devolution in college budgets.

EMIE gives advice and comment from one of the Project's Consultants, from the Chartered Institute of Public Finance and Accountancy and Coombe Lodge, and offers a contact in one LEA with long experience of this practice.

Further illustrations of requests are given in Appendix F, Report on EMIE enquiry case studies.

7.33 As the examples above show, EMIE's response to enquiries is usually in the nature of a 'snapshot' of policy or practice, with an indication of ways in which the enquirer can obtain more detailed information if required. The aim is to respond quickly, with information that will be of immediate practical assistance, or will contribute to the enquirer's knowledge or understanding. The Project also has the facility to carry out more extensive surveys when a need has been established: EMIE Consultants, for example, have produced a number of reports on aspects of LEA policy (see Appendix J, EMIE publications April 1982 - October 1984), drawing on information gathered from a sample of LEAs. EMIE has also, on one occasion, undertaken a national-scale survey by questionnaire (see Appendix K, Administrative use of computers by local education authorities) but because of the possibility of inconvenience to LEAs and the time and resources involved, it is felt advisable to restrict this level of enquiry to a minimum.

7.34 The case study exercise (see Appendix F) which examined the enquiry service gives a detailed picture of how LEAs perceive this service, and comment is also contained in the LEA independent evaluation (see Appendix G). For some education officers, the enquiry service is clearly already an established source of information which they use routinely when tackling a new area of work. As one EMIE link person explains, "It's just the natural thing to do. If I've got a new project I've got to do some work on, the first thought I have is that I should contact EMIE to see if anybody else has been working on it". Enquirers have found the service valuable because it:

- is prompt
- saves time
- promotes contacts between LEAs, sometimes leading to visits
- helps disseminate good practice
- makes a wide range of information available from one source
- makes the search for relevant information less haphazard, more systematic
- helps overcome insularity, by setting the LEA's work in a wider context
- provides information that enquirers would not be able to obtain themselves within the time available
- avoids duplication of research.

7.35 The enquiry service tests the effectiveness of the EMIE 'system' in all kinds of ways:

* Its success depends on having access to appropriate members of staff in education departments and on their willingness to share experience with others. Some authorities, due to the reputation of their work in particular areas of policy or provision, may bear a greater 'burden' of EMIE requests than others. All this calls for a great deal of goodwill on the part of the education authorities, a knowledge among EMIE staff and Consultants of whom to approach on a given topic, and sensitivity on the part of Project staff to the demands made on LEAs.

* Given the short time-scale for most requests, the Project needs to have knowledge and/or information on a sufficiently wide range of topics to enable at least a preliminary response to most questions, and a means of quickly obtaining additional information to form a satisfactory reply.

* LEAs look to EMIE for examples of 'good practice' (or useful experience) in other authorities. This gives the Project a responsibility to ensure that discrimination is exercised in the selection of information.

* The Project needs to be flexible, with members of staff always available to answer telephones and able to interrupt other work in order to answer urgent (and often time-consuming) requests.

7.36 The EMIE enquiry service has to strike a careful balance. Subject areas on which the Project attempts to respond already cover a very wide range, and LEA comments suggest that an even greater scope might be welcomed. If too many subjects are tackled, with limited staffing resources, the amount of time available to evaluate information and tailor it to individual needs is reduced and the Project risks becoming a mere clearing house for LEA committee documents. On the other hand, a restricted programme of policy themes would weaken EMIE's role as a responsive service which can act flexibly to meet changing needs. In order to free time to deal with the increased volume of specialised individual enquiries, staff have produced 'off-the-shelf' responses (ie. papers initially prepared for a specific audience, but of wider interest) wherever appropriate, and have re-used/updated the results of previous queries. The two latter approaches call for:

* a means of identifying topics which should be the focus of 'off-the-shelf' papers;

* a systematic method of recording enquiry results for later retrieval; and

* a means of readily updating this information.

7.3 Enquiry service cont'd

7.37 In addition to wider subject coverage, some LEAs are recommending that the enquiry service should be supported by more comprehensive information; in other words that in some instances it would be more helpful to know how all LEAs are proceeding with regard to a particular policy matter, rather than having a 'snapshot' based on the approaches of a small number of authorities. Reservations about national questionnaire surveys have been expressed (see 7.33 above); the task for EMIE is to judge when a more comprehensive survey of policy or practice will be sufficiently worthwhile to justify approaching many or all LEAs. Enquirers appreciate what one education officer terms the 'quality précis': if EMIE increases the amount of information it handles, it must also ensure that resources permit effective analysis.

7.4 Information collection

7.41 When the EMIE Project was first established it was agreed that information collection should concentrate on a set of key policy themes identified in consultation with LEA representatives. These were:

- falling school rolls and the management of contraction;
- transition from school to adult life;
- the Education Act 1980;
- assessment of performance;
- induction and in-service training of teachers;
- special education, including the Education Act 1981;
- computers, especially administrative uses.

The themes have been periodically reviewed on an informal basis at meetings with LEA link people. In broad terms the seven topics have been retained throughout the life of the Project as the 'core' of the information collection, though some have been given far more attention than others, reflecting the demands made by LEAs. Information on a variety of other topics has also been collected in order to respond to the very wide range of queries that the Project receives.

7.42 It would be difficult to operate the EMIE service without a 'core' of information on a number of important subjects. What the Project requires is a sound mechanism for deciding upon the 'core' areas and regularly assessing them in the light of the many other enquiry topics that the staff handle. The process of re-assessing priorities has happened in a rather piecemeal way, relying chiefly on advice and comment from LEA link people and from EMIE Consultants. We would suggest that a future advisory/consultative structure should enable a more systematic review of the information coverage in relation to LEAs' needs, and that this might be done by regular, perhaps annual, report to, and feedback from the Society of Education

Officers, in addition to regular consultation with a representative group of LEA officers.

7.43 The four main methods of gathering information from LEAs have been:

- routine intake of documents submitted by LEA link people without 'prompting' from EMIE;
- 'Information Wanted' leaflets sent occasionally to all LEAs to 'prompt' the supply of documents on a given topic;
- requests to individual LEAs for information on a specific topic, in order to satisfy an enquiry;
- requests to a sample of authorities (or, on one occasion, to all authorities) for information on a given topic, to be used as the basis for a review or survey, for example by EMIE Consultants.

The third and fourth methods have, generally speaking, worked very well, with a great deal of cooperation and goodwill from LEAs, though inevitably there are sometimes frustrating delays in receiving information. The first and second methods are, as might be expected, much slower and less reliable. One of the Regional Societies of Education Officers, in its evaluation of EMIE, helpfully recommends that there should be a more tightly organised network of link people, requiring link people to take regular action, and that people should be encouraged to submit information and documents at regular intervals. We believe that some link people have devised procedures for identifying documents of value to EMIE and for reminding colleagues of the need to contribute to the information exchange. In future the Project could consider advising link people about such procedures, drawing on the successful experience of other authorities. Above all there needs to be a way of 'maintaining momentum'; as one education officer has commented, EMIE may find that, after an initial flurry of activity, LEAs submit fewer documents on their own initiative. LEAs' interest in the information exchange needs to be periodically 'regenerated' to overcome, for example, the changes in link people. Deborah Greig cites the following comment in her report (see Appendix G): "The quality of the service is bound to be as good as the commitment of LEAs to it. Both quality and quantity will develop as awareness of the service grows".

7.44 In addition to the tasks of devising ways of obtaining LEA information at regular intervals and reviewing the topics that should be covered, two further matters need attention. One relates to the stage at which information is sent to EMIE. Most of the material submitted consists of committee or subcommittee reports necessarily reflecting the 'later' stages of policy formulation; early discussion documents are rarely received. Education officers have often commented, however, that they would prefer to see information which presents the inception, rather than the completion, of policy. The confidentiality arrangements which EMIE operates to safeguard sensitive material offer three levels of access:

- information which is open to any enquirer;
- information for use by education officers and advisers only;
- information for use only by Project staff and Consultants.

LEAs are however clearly reluctant to submit documents which are in a state of evolution. In handling specific queries, this problem is overcome to some extent by the willingness of officers to discuss questions with EMIE enquirers on the telephone, rather than releasing papers. EMIE would be more 'up to date' if information representing 'early' thinking on policy matters could be obtained, but this is clearly an area where the Project has little influence, beyond building up clients' confidence in the ability of the service to deal properly with sensitive material.

7.45 The second matter requiring attention is that of the 'type' of information that EMIE should collect and disseminate. Definitions have been somewhat confused: EMIE has been described as a 'management information service' on 'education policy' and 'practice' - a broad field to cover! Clearer guidelines are necessary: for instance, one of the SEO Regional Societies, in its report on EMIE, comments that "The project does not always seem to have been clear about the definition of a 'policy paper' as distinguished from other types of documents concerned with research, development or general background". All these kinds of information may be useful, for differing purposes. The Project needs to recognise the distinctions and identify the kind of documentation most suited to LEAs' needs. As with so many matters relating to the development of the service, this awareness can only be gained by close liaison with education authorities.

7.5 Client groups

7.51 Advisers

Though intended to serve education officers and advisers, EMIE has not yet directed any publicity towards the advisory service. In encouraging more advisers to contribute to and use EMIE, it will be important to define the scope of service that can be realistically offered. There may, for example, be a wish to see a much larger component of curriculum information. We would recommend that the service to advisers should be oriented towards policy, rather than towards the provision of more detailed practical information on individual curriculum subjects. Before publicising EMIE services for the 'adviser' audience, we would also suggest that there should be discussion with the School Curriculum Development Committee about the availability of curriculum information.

7.52 Other enquirers

Since the start of the Project, EMIE staff have dealt with enquiries from a small but significant audience outside LEAs. Most of these have come from headteachers or teachers, often in the course of in-service training work or secondment projects undertaken for their authorities; some have come from researchers or higher education establishments. Demand from the general public has been very limited.

There have however been proposals that EMIE should become a more 'public' service. The Advisory Centre for Education, in its Where article 'EMIE's secret service?' expressed the view that "Information which is made available to the administrator of the education system should not be kept secret from its users and from their political representatives".

There are two issues that we feel to be crucial in any consideration of EMIE's client groups:

* to be successful, an information service must have a clear idea of its target group and the needs of that group. If the needs of the group are too disparate, information cannot be effectively tailored to meet them;

* LEAs contributing information need to feel confident that the circulation of 'sensitive' information can be restricted.

EMIE was established to enable LEA professional staff to exchange information, and we feel that this should continue to be the primary aim. ACE has justifiably drawn attention to a gap in the provision of education policy information to the general public, but filling this gap would demand different resources, skills and methods from those which EMIE has developed.

The case for providing information to teachers, researchers, and those involved in in-service training in education management may be more persuasive, given EMIE's orientation towards practitioners and professionals. However, without substantial additional resources, there would be difficulties in catering for more than a limited audience of this kind, and given the availability of public and institutional libraries and teachers' centres, we do not feel that EMIE would be justified in developing specially-tailored services.

It may be possible to expand the volume of information available to non-LEA enquirers simply by improving procedures for classifying confidential and non-confidential information. At present, information is often submitted by LEAs without any indication of its level of confidentiality; in these circumstances staff classify the material as 'for LEA use only' to guard against any possible misuse. This may be an over-cautious approach. If link people were urged to use

7.5 Client groups cont'd

document submission sheets specifying confidentiality levels, and if confidential material were reviewed at regular intervals, more information might become accessible to a wider audience.

7.6 Access to EMIE

7.61 Access to EMIE is by letter and telephone; on rare occasions LEA staff and others have visited EMIE in order to discuss information needs with Project staff and to see the computer databases for themselves. Education officers occasionally pass on enquiries at events attended by EMIE staff.

7.62 The original Project brief envisaged the possibility of remote access by LEAs to the computer database and the need to enhance the NFER computer system if a large number of users were to be supported. LEAs' interest in direct access to EMIE is confirmed in the independent evaluation (see Appendix G) where authorities speak of "exploiting technology in order to yield more information, more quickly, to more users". Several LEAs have registered their wish to be involved in any pilot project established to test the idea of direct access.

7.63 With staffing at 1984 levels it would not be helpful to promote the idea of individual or group visits to EMIE to use the computer databases or to review the available information. Individual enquiry by letter and telephone should be the principal means of access, though at the same time the possibilities for direct computer links should be investigated.

7.7 Database evaluation

7.71 The maintenance of the EMIE computer database - the input and retrieval of information - has been, for the greater part of the Project's life, a 'one-person' operation. It was decided early on that more attention should be devoted to dissemination, than to elaborating procedures for recording and storing information. For these reasons - limited staffing and a concentration on dissemination - the procedures for recording and updating information held on the computer have not been as systematic as they might be, and success in retrieving information can depend on the operator's knowledge of the 'system'. As the size of the database grows and the use of the information exchange increases, it becomes more urgent to design reliable and systematic procedures for recording and updating information and for 'purging' outdated material. A fresh look at indexing methods may be necessary to improve the reliability of retrieval; this would be essential in a system allowing direct access by LEAs. A means of obtaining regular reports from LEA link people on the 'status' and confidentiality of their authorities' documentation would also help to make the updating of the database a matter of routine.

7.72 The Project's intention has always been to provide an information service which is supported by documents, but does not rely on them exclusively. Stress is placed on creating contacts between education officers, and/or giving concise summaries of LEA initiatives as a substitute for, or as an introduction to, information held in documents.

It is possible to enter 'non-bibliographical' information, such as brief notes of LEA initiatives, on the computer database, but this facility has been under-used. For the many queries where LEA policy documents, recorded on the database, do not provide a complete answer, staff rely on their own and their Consultants' knowledge, and on information recorded in correspondence files, to provide 'leads'. As demand on the service grows, ways will need to be found of maintaining notes of policy developments for later retrieval, though discretion will need to be exercised in deciding what information to record: indications of policy initiatives conveyed in an 'informal' manner by education officers might be endowed with an unjustified degree of permanence or authority once incorporated into the computer database. Clearly the Project should not be recording or disseminating information which the original 'providers' would not wish to have circulated.

7.8 Footnote

The EMIE Project has tested a variety of approaches to information provision for education officers; the above comments and the various evaluation reports highlight areas of achievement, and difficulties to overcome, as well as the kinds of future developments that LEAs would welcome. None of the evaluations has proposed that any aspect of the established information service should be discontinued; all point instead to an increasing growth and the need to heighten awareness of EMIE among LEAs. There has been a suggestion that this might be assisted by directing public relations activities towards selected LEAs, in order to reduce the imbalance in authorities' use of, or contribution to, the information exchange. The 'dual provision' of an individual enquiry service and a larger scale programme of publication and dissemination seems to be an approach which LEAs favour. Personal contact between education officers and EMIE staff helps to keep the service 'in touch' and also provides a very immediate test of the quality of the service. At the same time, the service should have an impact at a more general level to help ensure continued interest in each LEA. This means producing a regular and frequent output of information to all authorities and, periodically, to significant regional and national networks and publications, including the education press. Dissemination should serve the joint purpose of meeting information needs and keeping the information exchange alive among LEAs.

PART TWO: OTHER EMIE ACTIVITIES

8. INVOLVING THE PROFESSION IN THE WORK OF EMIE

8.1 The guiding principle in the development of EMIE, set out in section 1.3 above, was that the service should respond to the perceived information requirements of education officers and should take account of their work concerns and pressures. Various approaches were adopted in attempting to find out how education officers use information in their work and what sorts of information were likely to be appropriate. These approaches included direct observation, informal discussion, meetings with nominated link people, information workshops, and, of course, monitoring the enquiries received by the information service.

8.2 Several characteristics of the behaviour of education officers when using information were noted during the observation periods already described and four of these have already been mentioned (1.31 above). In addition to the fragmented nature of the working day, the rapid disposal of documents and publications, the substantial time spent in meetings and the minimal use of information stores already noted, several features were of interest:

- most of the 'information events' consisted of conversations (face-to-face or telephone);
- systematic and protracted searching for information on matters of current concern was not observed;
- staff were interested in the approaches other LEAs had taken to their own current problems;
- they tended to seek information or advice by talking to or telephoning colleagues; and
- they showed readiness in responding to requests for information or advice in this way.

EMIE has attempted to make use of all these characteristics in building up services and in drawing them to the attention of education officers.

8.3 The part played by the Society of Education Officers in providing a national and regional communication network for education officers was readily apparent during observation. Opportunities for informal discussions with education officers have been provided by the SEO throughout the life of the Project and some of these are described in section 9. More recently the Local Education Authorities Research Group has provided a number of opportunities to learn about particular areas of concern and to take soundings on other issues (see 10.1 below).

The other principal form of involvement of education officers in the work of EMIE has come about through the information services. In responding to requests for information, contacting other people to obtain information, and even in asking people to answer questions about their use of the information services, EMIE staff are constantly involved in a dialogue with education officers about the issues which are presenting problems or opportunities in LEAs. Maximum use can only be made of the knowledge being acquired by EMIE staff about these issues and the responses to them, if opportunities can continue to be found for applying this knowledge in various forms of collaboration with education officers.

8.4 Meetings with link people (see also 1.32 above)

8.41 When the EMIE information services were launched nationally in April 1982, and again when the Welsh LEAs officially joined the Project in June 1983, meetings were arranged between link people and the EMIE staff and Principal Adviser. Four meetings were arranged in Birmingham, Leeds and London (2) between July and September 1982. After hearing a formal report of progress, participants were invited to predict the major issues likely to affect their LEAs during the next two years and to assess the likely role for EMIE in relation to these issues. These sessions were conducted in small groups to encourage maximum participation, and proved to be an effective way of persuading people to describe their information needs (a notoriously difficult process according to the library and information studies literature). These sessions served to confirm the main Project themes (see 7.41 above) and to provide more detailed information about likely preoccupations in relation to each of these. More generally, the meetings encouraged education officers to regard EMIE as a service for them, and one over which they had some immediate influence. (See Appendix L: Report on meetings with EMIE link people). The small group activity in the London meetings was made possible by four NFER colleagues, who acted as discussion leaders. Their help is gratefully acknowledged.

8.42 Later meetings with link people took a somewhat different form. Open days for small groups of link people and other interested LEA staff were organised at the NFER in September 1983 (3 events) and February 1984 (2 events). These occasions provided an opportunity for education officers to gain more detailed knowledge of EMIE's progress and possibilities for the future, and to discuss various aspects of the service in detail. The EMIE staff were supported on these occasions by the Principal Adviser, by three of the EMIE Consultants in turn, and by the NFER Computing and Statistics staff. A total of 54 LEA staff attended an open day. An additional open day was arranged for six staff of Buckinghamshire LEA at the suggestion of Mr. R. Harding who was then the County Education Officer.

8.43 Following a special meeting of LEA staff at the Welsh Joint

8.4 Meetings with link people cont'd

Education Committee in June 1983 at which the Project Head discussed EMIE with representatives of seven Welsh LEAs, a further meeting was arranged for link people in Wales at the same venue in November 1983. This meeting took the form of a presentation by EMIE staff, supported by the Principal Adviser and by C.I. Mr. I. Lloyd. One outcome of the discussion at this meeting was a request to provide information for an SEO Wales training event in the following year.

9. EMIE INVOLVEMENT WITH THE SOCIETY OF EDUCATION OFFICERS

9.1 Involvement with the SEO has been established and maintained in a variety of ways. The SEO is one of the Project sponsors. The Principal Adviser, Mr. G.V. Cooke, was General Secretary to the Society until February 1984, and the new General Secretary, Mr. R. Harding, has been the SEO representative on the EMIE Steering Committee from the outset. There are frequent contacts between EMIE and the SEO office, and the SEO officers and staff have often provided advice and information in dealing with enquiries. EMIE staff have been permitted to attend all the annual general meetings and Summer conferences held by the Society during the period of this report and to display EMIE publications on these occasions.

The Project Head, accompanied by the Principal Adviser and S.I. Mr. G.T. Peaker, made presentations at meetings in all SEO Regions during the Spring and Summer of 1981 (attended by a total of 342 SEO members); a further cycle of meetings to report on progress was undertaken in 1984.

Committee papers and minutes are regularly sent to EMIE by the Executive Committee and by several Regional Committees. These give a useful indication of current topics of interest as well as providing the names of potential contacts on those topics.

9.2 Information workshops

9.21 Four information workshops for education officers were organised by EMIE in collaboration with the Training Committee of the SEO South East Region, in November 1982, January 1983, and in January and February 1984. These events were led by Professor T.D. Wilson (Department of Information Studies, University of Sheffield) and the Project Head. Participants examined problems in obtaining, keeping and using information in LEAs. The first event was open to education officers in the South East Region; the other three served as follow-up days for participants in the week-long residential course for professional assistants organised by the SEO and held in the previous Summer.

9.22 Participants in the first workshop expressed particular interest in the use of computers for administrative purposes and in broader aspects of information technology management. Accordingly a one-day information technology workshop was developed, again in collaboration with the South East Region of SEO. This workshop was designed by the Project Head and Senior Research Officer with Mr. D. Foreman (ILEA) and was based on a case study of the introduction of a teacher records system into an LEA. The information technology workshop was held for the first time in June 1983 as a direct follow-up to the first workshop and, after modification, was repeated in November 1983 and May 1984, this time also in collaboration with the East Anglian Region of SEO. Since the last two workshops were heavily over-subscribed, an additional event was arranged for staff of Hertfordshire and Buckinghamshire LEAs in June 1984. (See Appendix M: Report on eight information workshops organised with the Society of Education Officers.)

Education Officers from other SEO regions were invited to attend the last two information technology workshops in the hope that they will organise similar activities in their own regions. To help in this 'export' process, the SEO South East Regional Training Committee has published all the documentation used in the workshops and a set of notes for workshop organisers under the title Information technology workshop for education officers. Copies of this publication have been sent to the other SEO regional training officers.

9.23 All these events helped EMIE staff to learn more about the problems of being an education officer and of using information in this work. Participants were, hopefully, made more generally aware of the information component in their own work and of the overall significance of information and its communication in an LEA context.

9.3 SEO Industry Committee

Association with the SEO Industry Committee programme of work began in the Spring of 1982 when Dr. B. Kington took up the post of SEO Industry Liaison Officer on a two year secondment from IBM. Regular meetings to exchange information were held with Dr. Kington throughout the two years until his return to the industrial world in February 1984. Products of this association included the editing and publishing of the SEO Industry Committee newsletter (May 1983 -) by EMIE staff; a series of meetings with the Industry Committee to discuss its use of information; preparation of briefing papers for the Industry Committee; and, most recently, agreement by the Industry Committee members to participate in a Delphi forecasting activity aimed at identifying future priorities in relation to education-industry policy issues.

Another initiative, involving a survey of the extent of LEA use of computers for administrative purposes, is described below (see 9.4).

EMIE became involved with the SEO Industry Committee for several reasons. EMIE staff had earlier identified the substantial part played by meetings in the working lives of

9.3 SEO Industry Committee cont'd

education officers and wished to learn more about how to provide effective information support for such activities so that these lessons can eventually be applied elsewhere. The relationship between education and industry was seen as an increasingly significant one for EMIE as for the education field generally and the SEO was building up its work in that area throughout most of the life of the EMIE Project. Again, the appointment of Dr. Kington to a new post without extensive resources made the idea of collaboration with EMIE attractive. Finally, but not least significantly, EMIE staff found a ready and sympathetic response to the idea of collaboration in various ways from Dr. Kington and from the Chairman and members of the Industry Committee. Indeed, the initial limited proposals for providing briefing papers on specific issues were soon extended by the Committee in the direction of an informal 'information consultancy'. This in turn led recently to the proposed Delphi forecasting activity, which is aimed at helping the Committee to arrange its work priorities as well as helping EMIE staff suggest ways of organising suitable information provision to meet these priorities.

A comment from the former SEO Industry Liaison Officer on the EMIE association with the Industry Committee is attached as Appendix N.

9.4 Survey of the administrative use of computers

From the outset EMIE received a steady stream of enquiries about the administrative use of computers in LEAs. These sometimes took the form of requests for contacts in other LEAs who were using similar computer systems; more often they related to particular applications or potential applications. Both sets of information were difficult to provide because developments in this area were rapid and no general picture of the extent of the application of information technology in LEAs was readily available.

The SEO Industry Committee was particularly concerned with developments in this field and members frequently received similar kinds of questions. A questionnaire survey of all LEAs was proposed as a joint venture between EMIE and the Industry Committee; this was conducted by EMIE with Industry Committee support in the Spring and Summer of 1983. The report on this survey, Administrative use of computers by local education authorities (see Appendix K) was published by EMIE in November 1983 (free to LEAs, on sale to others) and the detailed information from 95 LEAs in England and Wales about systems and applications has been regularly used since in answering EMIE enquiries.

Two trends revealed by the survey were regarded as significant enough to warrant greater attention. Firstly, respondents showed a growing interest in the potential scope of computer-based systems as an aid to management decision-making. Secondly, there was evidence of a laissez faire attitude towards computer administration, especially in schools, which carried inherent dangers of resultant inefficiency. Apart from publication of the report, the overall results of the survey and the emerging trends were presented in various ways. An article in Education (by the Project Head and the Hon. Secretary of the SEO Industry Committee) aroused some interest (see Appendix O). The Project Head was then invited to give papers on that theme to the Local Authorities Management Services and Computer Committee national conference in March 1984 and to the Institute of Local Government Studies statistics workshop in November 1984. He also contributed a chapter, on the application of information technology to the administration of education in the United Kingdom, to a comparative report being prepared by the International Institute of Administrative Sciences for UNESCO, in September 1984.

9.5 Other SEO involvement

9.51 Apart from the training activities already described, work with SEO Regional Committees has so far been limited to the provision of briefing papers for special meetings on particular issues and for training events. These briefing papers appear to have been well received and have been used more widely after the events for which they were prepared, but EMIE has so far had little opportunity to work at Regional level and to learn about the most effective forms of involvement. No specific comment has so far been made by SEO Regional Officers about the limited response to the EMIE offer of collaboration (including exploratory meetings between EMIE and SEO members in two Regions) but two likely causes of this response can be suggested:

i) Regional SEO meetings tend to take the form of relatively brief discussions of a lengthy agenda of items, many of which reflect or appear in response to national SEO initiatives. The meetings are usually held three or four times per year and are serviced by volunteer officers. Training events and special meetings are again likely to be organised by volunteers and may consist of a group of interested members coming together to hear one or more invited speakers. The administrative support available for regional meetings is likely to be skeletal and any innovation in relation to the management of these meetings is therefore likely to appear daunting to the busy people who are directly involved;

ii) SEO Regions are probably at their most powerful as informal networks of contacts focussed on news of developments within the Regions. Regional members may also feel a sense of autonomy as a Region. The fact that EMIE is nationally based and has most to offer in the form of information from outside the Region may limit the scope for effective collaboration.

9.52 Early discussions with the staff of the small SEO national office suggested one area of co-operation likely to be of benefit to SEO members who were not involved in consultation about particular issues. The SEO is frequently asked by central government and other bodies to comment on a particular issue, often at short notice. It would be prohibitively expensive and not very helpful to circulate all the resulting papers to all SEO members. Instead, EMIE staff agreed to abstract the most significant papers and to publish the results in a leaflet for SEO members. Three annual editions of Recent SEO documents were published in this way, publication being timed to coincide with the SEO annual conference. Copies of the leaflet were distributed at these conferences, backed each year by a small display (prepared with the support of NFER staff) describing aspects of the EMIE service.

9.53 The activities conducted in relation to the SEO at national and regional level were intended to:

i) make effective use of the important communication network provided for education officers by the SEO;

ii) enable EMIE staff to learn more about how to make effective use of such networks;

iii) increase the impact of EMIE information by associating or investing it with the reputation of the SEO;

iv) save some time and energy of EMIE staff by enlisting the support of SEO members (for example, in setting up training events);

v) project a view of EMIE as 'not just an information service' by making evident the active EMIE approach towards exploration of the use and usefulness of information;

vi) associate EMIE with useful initiatives, such as interesting training experiences;

vii) identify EMIE as a source of information on the topics covered by each initiative;

viii) explore various means of linking an information service handling policy information into a framework where policy matters are discussed and where policy is formulated;

ix) emphasise the necessary dependence of EMIE upon the contribution of information and support by education officers.

10. INVOLVEMENT WITH OTHER BODIES

10.1 Local Education Authorities' Research Group

This Group was formed as a result of discussion between the Project Head and various LEA research officers. A leaflet was circulated by EMIE to all LEAs in England and Wales in February 1983, suggesting the formation of a self-help group for education officers with a research, development or planning role or with an interest in LEA activities in these areas. As a result of the encouraging response to this leaflet, a preliminary meeting was arranged in July 1983 and a planning group was formed. The EMIE Project Head chaired the planning meetings of the Group during the first year and the Senior Research Officer acted as secretary; it was made clear that this was a temporary support arrangement only.

During the first year seminars were arranged on the classification of impairment and on forecasting pupil numbers (held twice because of demand). A questionnaire survey of LEA in-house research, development and planning activities was undertaken by EMIE for the Group in 1984. The survey was intended to supply material for an LEARG-published directory and for the EMIE service.

At the first annual general meeting of the Group in June 1984 a new committee was formed with LEA education officers serving as chairman and secretary. The Senior Research Officer continued to act as a member of the committee.

The LEARG offers a potentially useful network of further contacts for EMIE as well as a means of identifying local research expertise and of keeping up to date with certain key educational issues. If the information supplied for the directory of research is regularly updated this should also provide EMIE with a useful means of keeping up to date.

A leaflet describing the Group, issued prior to the annual general meeting, is attached as Appendix P.

10.2 Local Authority Associations

A meeting was arranged between the Education Officers of the Association of County Councils, the Council of Local Education Authorities, the Association of Metropolitan Authorities and the EMIE Project Head and Principal Adviser, in March 1982. Since then these bodies have passed information to EMIE on a regular basis and have helped in dealing with a number of enquiries. The new Education Secretary of AMA, Mr. R. Morris, visited EMIE in February 1984 to discuss continuing co-operation.

10.3 Education Policy Information Centre

Regular meetings were held between EMIE and EPIC staff during 1982 and 1983 to review topic areas for questions, and other aspects of co-operation. The Senior Research Officer prepared a report on aspects of the transition from school to work in response to a request from the EURYDICE Central Unit in September 1982 and other help was given in answering questions from time to time. When the new Information Research and Development Department at the NFER was formed in April 1984, the EMIE Project Head became Department Head and also took over responsibility for EPIC. EMIE and EPIC staff now share accommodation in the NFER Library block and the EPIC Senior Information Officer participates in the weekly EMIE team meetings.

10.4 University of Sheffield

Three postgraduate students from the Department of Information Studies at the University of Sheffield carried out dissertation projects in association with EMIE in the Summer of 1983. Two of the students studied aspects of the implementation of information technology in LEAs as a follow-up to the questionnaire survey already described; the other student conducted telephone interviews with users of EMIE abstracts as noted earlier (see Appendix E: Evaluation of education management abstracts no.3).

Although this collaboration was useful it also made clear that the employment of people to provide short-term support for a research programme (on whatever basis) can only be done at the cost of considerable time and effort on the part of the full-time research staff.

11. OTHER ISSUES

11.1 EMIE funding

The research grant from the DES for the Project amounted to £217,200 over four years and the NFER contribution over that period was equivalent to £86,900. These sums are relatively small if considered as equivalent to an annual allocation of £739 per LEA in England and Wales.

Considerable attention was given to alternative methods of funding EMIE during the early part of the Project. As part of an effort to investigate pricing methods for information services, the Project Head made a brief visit to the USA and Canada in November 1981. The other aims of the visit were to explore the overall financing methods used by American information services in education and related fields and to find out about innovative information services of potential relevance to EMIE. It was eventually concluded that direct charging for services (including publications) could not make a major contribution to the overall funding of EMIE without seriously affecting the nature of the information services. The main reasons for arriving at this conclusion were that:

1) there is no tradition of buying and selling information services in the United Kingdom. Even in the USA and Canada, where fee-based information services are more common, none of the information services offered in the education field is directly self-financing and none of those visited saw this as a feasible objective;

2) the present restrictions on local authority expenditure do not create good conditions for securing expenditure from LEAs on a new venture;

3) all the evidence suggests that substantial expenditure on well-designed and expensively printed service products is necessary in order to attract subscriptions and that a sustained 'sales drive' is required. It is necessary to spend money on presentation in order to make money (see Marajian, L. and Boss, R.W., Fee-based information services, New York: Bowker 1980);

4) since LEAs are the main contributors of information to EMIE, any reduction in the number of participating LEAs would have a detrimental effect on the information available;

5) LEAs might reasonably be expected to be paid for information supplied if they were charged for information received;

6) individual education officers might feel constrained in their use of the service if the subscription rate was based on the level of use. For example, would potential enquirers have to seek clearance before contacting EMIE and would EMIE staff refuse to help enquirers if the appropriate number of enquiries or amount of staff time had been exceeded?

7) since there is no obvious relationship at present between the size of authority and frequency of use of EMIE information services, a charge based on the size of authority might be difficult to justify;

8) given the necessity to review and renew expenditure within LEAs each year, it seems likely that EMIE could not be sure of its annual subscription income until well into the financial year. This would make planning and development of the services difficult;

9) although some educational bodies other than those actively served by EMIE might find access to EMIE information attractive on a subscription basis, it would be reasonable for such subscribers to expect to receive services directly geared to their information requirements. This might well lead to substantial alteration in the priorities, range of services and the subject coverage of EMIE;

10) some scope for the sale of publications and, possibly, training course places already exists, but a significant increase in such activities would affect other aspects of service provision unless additional staff could be hired.

To summarize these points, there is obviously a series of inter-relationships amongst specific charges for services, methods of provision, scales of provision, and overall operating costs of any service. At present the EMIE emphasis is on providing an intensive service at relatively low cost. Any extension of services or change in the method of provision will inevitably lead to substantial increases in the operating costs and might also bring about a decrease in the effectiveness of the service given to education officers and advisers. The best option for EMIE appears to be some form of direct funding from one or more sources.

It is difficult to make effective comparisons of the costs of different information services or to assess the extent to which a particular service would be missed if it were withdrawn. Cost comparison is particularly difficult in the case of EMIE, which has set out to provide a much more intensive service than most other information centres for practitioners. The EMIE services were specifically designed for a particular client group and, in this sense at least, the best comparison might be with a specific service designed for research scientists such as Chemical abstracts, for which the annual subscription is currently £6,394. This comparison could not be sustained very far since Chemical abstracts is based on a weekly publication, is international in scope and relies upon published information, but it is perhaps worth underlining the point that the systematic provision of information in a form that can readily be used by recipients is an expensive process.

The sorts of small-scale surveys of other LEAs traditionally made by education officers when looking for information are expensive in staff time, even if the cost of doing this work is lost within the general operational budget. Evidence was collected in the Report on EMIE enquiry case studies (Appendix F) and in the Evaluation of education management abstracts no.3 (Appendix E) that the EMIE service saves the time of education officers by gathering information which they would otherwise have to collect themselves. It was also suggested by respondents that EMIE is more efficient in its information gathering activities than the individual education officer could be because EMIE staff have access to a wider range of information sources. If even a relatively small number of education officers across the country resort to EMIE rather than engaging in time-consuming information-seeking on their own, it is clear that the EMIE service is saving the education service money by releasing valuable time of education officers for other tasks.

A report on the Visit by the Project Leader to the USA and Canada is included as Appendix Q.

11.2 EMIE publicity

An important means of publicising the EMIE service has been through the publications produced as part of the information services, but other vehicles have also been used. One early decision was to confine EMIE publicity to the 'education officer network', to avoid additional demands being placed upon the small Project team by other educational organisations or individuals. For this reason articles on EMIE have usually been placed in Education rather than other education journals with a wider readership. Similarly, two versions of the EMIE introductory leaflet were produced for education officers and advisers (green), and for all other enquirers (blue) respectively. These differed slightly in tone and content and only the green version carried the Project's direct line telephone number (see Appendix R). The public relations activities involving the SEO have already been described.

Occasional EMIE newsletters were published and sent to anyone expressing interest in the Project, but again a wide readership was not sought (see Appendix S).

An exception to the general limitation on publicity was made in the case of people with an academic interest in information services and systems. The Project Head contributed papers to meetings of the International Research Forum on Information Science in Borås, Sweden in 1981 and Heidelberg in 1983, conducted seminars on the EMIE development strategy in various Scandinavian locations, and contributed an article to Social science information studies (the main international journal in this field) under the title 'Moving towards the information user: some research and its implications' (October 1983).

11.3 EMIE Steering Committee

The Steering Committee met on nine occasions, in March, June and December 1981; May and December 1982; May and November 1983; and May and November 1984. Regular progress reports and statistical reports on the enquiry services were presented to these meetings and work programmes were considered and approved. The Steering Committee also set policy guidelines on a range of issues and advised the Project staff about aspects of the service. Some of the issues considered by the Steering Committee were limitation of access to EMIE, the service priorities, evaluation of services, possible charging policies and funding strategies.

The Steering Committee was chaired successively by Mr. D. G. Libby (March 1981 - December 1981), S.I. Mr. I. B. Butterworth (December 1982 - May 1983) and Mr. C. A. Clark (May - December 1984). S.I. Mr. M. Wylie, Ms. J. F. Cramphorn and Mr. R. W. Chattaway took the chair on other occasions. Mr. D K. Timms was Secretary to the Steering Committee until May 1983 when Mr. R. W. Chattaway took over. Mr. J. J. de Souza acted as Secretary on three occasions.

11.3 EMIE Steering Committee cont'd

The other Steering Committee members and, where appropriate, the bodies they represented were:

Dr. C. Burstall (NFER)
Mr. G. V. Cooke (SEO)
Mr. I. G. Cunningham (ACC)
Mr. C. J. Dowe (December 1981 meeting only)
D.I. Miss V. J. Evans
Mr. R. Harding (SEO)
C.I. Mr. I. R. Lloyd (Welsh Office - from November 1983)
Mr. A. N. Naylor (AMA)
Mr. P. Sain-ley-Berry (December 1981 meeting only)
Mr. D. Stopford (March 1981 meeting only)
Professor T. D. Wilson
S.I. Mr. M. Wylie (until May 1982)

S.I. Mr. G. T. Peaker attended meetings until December 1981; S.I. Mr. I. B. Butterworth then attended until May 1983.

12. OTHER EMIE ACTIVITIES: CONCLUDING COMMENT

EMIE has achieved whatever success it has had on the basis of providing relevant information to education officers when they need it. Clearly the information services provided by EMIE were the most important element of the operation, but education officers have been quick to comment that the sensitivity to issues which is required in order to provide an effective information service can only be obtained through continuous active involvement with education officers. At the minimum level the additional services described in sections 8 and 9 of this report have provided the means for EMIE staff to be involved with education officers. Some, at least, of the activities have gone further in making EMIE a visible element in the professional life of at least some education officers, and in providing the means to exploit information more effectively than could be achieved by any 'passive' information service. It has been constantly argued by education officers that EMIE should attempt to be proactive as well as reactive in dealing with significant educational issues; the experience of EMIE over the past four years has shown several ways in which such an approach can be attempted.

EMIE

Final Report

David Streatfield
Sue Taylor

Appendices

Education Management Information Exchange

Education Management Information Exchange
The Mere
Upton Park
Slough
Berkshire SL1 2DQ

1984

Sponsored by:

Department of Education and Science
National Foundation for Educational Research
Society of Education Officers
Welsh Office

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IMPLICATIONS OF THE OBSERVATION WORK FOR THE DESIGN OF EMIE SERVICES

(Report to the Project Steering Committee, May 1982)

Education Management Information Exchange: Implications of the observation work for the design of the EMIE services. Report by the Project Leader.

1. BACKGROUND

Three week-long periods of observation were carried out by the Project Leader in two LEAs early in the life of the EMIE Project. The aims of this work were:

1. to introduce the Project Leader to the working environment of a few Education Officers as a means of learning about some of the working methods and pressures associated with that work;
2. to enable the Project Leader to learn something about the content of educational administrative work;
3. to ensure that the relationship between information and the context in which it is used by Education Officers was kept in focus by the EMIE staff;
4. to gain some preliminary insights into communication behaviour in LEAs which should help to make the preliminary design of EMIE services appropriate.

This paper is concerned with the fourth of these aims.

Narrative reports have been prepared on all three observation periods and copies have been circulated to members of the Steering Committee. A further paper (in preparation) will examine some of the more general findings of the observation work and attempt to relate them to emerging propositions about communication in organisations based on other research conducted in the United Kingdom and the United States of America.

Reference to earlier Project INISS observation studies of social services staff is made where this is thought to be appropriate. An account of the main Project INISS observation findings has already been circulated.

2. MAIN CHARACTERISTICS OF INFORMATION-RELATED BEHAVIOUR

Although the three people observed were doing different jobs and were at various levels of seniority, they (and their colleagues with whom they were in contact during observation) shared a number of characteristics of interest in the design of EMIE information services:

A) their work was fragmented with frequent interruptions, changes of topic and different participants in their communications;

B) they disposed of most documents and publications received in a very short time, particularly when their contact with this written material only involved reading (as opposed, for example, to referring to a document in a discussion or writing a report based on documents);

C) most of the information events were conducted through oral (face-to-face or telephone) channels;

D) they all spent substantial amounts of time in previously scheduled meetings;

E) they showed no tendency to engage in systematic and protracted searching for information on matters of current concern, but;

F) they evinced interest in the approaches other LEAs had taken to their own current problems;

G) they tended to seek information or advice by contacting colleagues in their own or other departments, usually through oral channels; and

H) they showed readiness in responding to requests for information or advice in this way;

J) they made little use of formal information stores apart from department files.

In all these characteristics the Education Officers were similar in their behaviour to the social services department managers observed by Project INISS. Some differences were, however, detected. The work of the Education Officers was even more fragmented than the average for social services staff (74% of information events were over in three minutes or less, compared with 62% for social services staff) and the average time spent by the Education Officers in reading documents and publications (84% took one minute or less) was shorter than for the social services managers (72%). Two more differences were noted:

K) the span of responsibility held by the LEA staff tended to be narrower than that of corresponding levels of staff in social services departments, reflecting the larger size and greater complexity of education department work;

L) the process of directly "feeding in to the policy making pool" appears to involve a larger proportion of LEA staff, at least intermittently.

[Evidence in support of these statements can be found in the individual narrative reports. Direct comparisons of this kind should, however, be treated with some caution since the number of observation periods conducted and the method of choosing 'volunteers' does not make statistically valid comparisons possible].

Some implications of these characteristics are now examined.

3. FRAGMENTATION AND RAPID READING

From the point of view of services (such as the EMIE service) which are attempting to present written information to Education Officers their characteristic behaviour has positive and negative aspects. The frequent topic changes (A above) suggest that there is a reasonable chance of a published item receiving attention soon after its arrival. However the rapid scanning habit (B above) will ensure that only brief notice will be taken of the item. It is therefore important to ensure that the publication is so organised that it is possible either to scan it adequately within three minutes or to establish within a one minute time span that the item should be read. If the latter result is achieved it is likely that the publication will be set aside or taken home for possible later reading. The time intervals suggested here are based on the fact that, as already noted, 84% of all 'reading only' events took one minute or less and that no less than 97% of 191 such events were completed in three minutes or less.

Project INISS experience has shown that it is possible to prepare publications (such as the abstract bulletin circulated with the Steering Committee papers) for scanning within a three minute time span. For longer reports it is necessary to attach a summary sheet outlining the main conclusions (giving page references) or in other ways help the potential reader to establish that a publication must (or need not) be read.

4. ORAL COMMUNICATION

About 70% of all information events observed in the Project INISS and EMIE Project studies involved face-to-face or telephone communication (C above). The usual response to a problem or desire to find information both in social services and education departments was to contact a colleague (G and H above). Again, most of these contacts involved talking or telephoning. Any reference to a publication in such conversations would normally involve the respondent giving a quick resumé or reading out selected phrases rather than suggesting that the enquirer read something. The 'old-boy network' is clearly of major importance in sharing information relevant to people's work.

To be effective in encouraging Education Officers to use information and advice available in other LEAs, the EMIE service must take full account of this behaviour. It is already apparent from comments made by Link-people and others that an approach which broadens and strengthens the network of contacts available to an Education Officer is likely to be welcomed, providing that these contacts prove to be helpful. Accordingly, attention is being paid by the EMIE staff to finding out who is responsible for writing particular committee papers, overseeing areas of work, directing innovations, etc., as well as introducing a variety of 'quality control' measures to assess this work.

5. MEETINGS

The three Education Officers spent an average of 14.2 hours in previously scheduled meetings (D above). No reference is made here to the time spent in preparing for and travelling to these meetings, nor to the impromptu meetings held from time to time. Even so it is obvious that meetings are a dominant factor in the life of many Education Officers.

Again there are positive and negative implications in terms of information service design. Preoccupation with and attendance at meetings obviously limits the availability of Education Officers as oral contacts and limits their ability to assimilate publications and documents. On the other hand an approach based on using existing meetings for information dissemination purposes may prove fruitful.

Experience with Project INISS suggested that people are more likely to be receptive to published material if it is presented when their attention is taken up with the issue under review. Using this approach, it may be possible to encourage the chairmen of internal policy meetings (usually the CEO) to suggest EMIE as a possible source when asking individual members of staff to prepare policy or discussion papers on relevant topics. Similarly it may be possible to identify internal committees (or SEO regional panels etc.) which are actively interested in a topic and to feed in information from the EMIE service.

For example, a group of Education Officers considering some aspects of the 1980 Education Act might welcome a review of the experience of other LEAs in tackling the same issue. A small-scale activity, involving the EMIE Consultants as appropriate, could be attempted to test the feasibility of this approach (see also EMIE (82)3).

One special type of meeting offers considerable potential for this sort of exploitation. When Education Officers are involved as participants in in-service or professional training activities they should be receptive to carefully prepared information products. There are obvious difficulties in identifying appropriate courses and in preparing suitable material but the results may well repay some effort spent in this direction.

6. INFORMATION STORES

One respect in which the Education Officers observed were at a disadvantage compared with their social services colleagues was in the provision of (and consequently, the use of) department libraries, organised information collections or other systematic information services (J above). We do not yet know how many LEAs maintain a headquarters library or information service or a computerized record system, nor do we know how many departments employ research or information officers. My impression is that the number is smaller in each case than with social services departments. To the extent that such services exist it may be possible to 'steer in' EMIE services. Identification of these services and their resources is one immediate priority for the EMIE Project.

7. INFORMATION SEARCHING

Systematic searching for information in relation to a particular problem or to the preparation of a report or discussion paper was hardly observed at all. However, all three staff observed expressed interest in what other LEAs were doing from time to time and made some reference to or use of examples or ideas drawn from other LEAs (E and F above). As already noted many Education Officers are not well served by information services and they may also lack proficiency in information seeking and information handling. Since many Education Officers have devised 'coping mechanisms' to enable them to manage with the information readily available it may be difficult to persuade them that additional information is desirable.

One approach to information handling problems would be to offer training modules to the organisers of existing management training courses aimed at Education

Officers. These course components would focus on people's information seeking and information handling behaviour to suggest how they could make better use of the information already received, how to control this information more readily and how to seek out and obtain other information when this was deemed relevant. Underlying this approach would be an attempt to learn more about people's information-related behaviour and to create conditions for more effective use of the EMIE service.

8. IDENTIFYING RECIPIENTS OF SERVICES

Since Education Officers appear to have readily identifiable spheres of activity (which may be made explicit in their job titles) it should be possible to prepare carefully differentiated information products for different groups of staff (K above). One method of alerting people involved in the preparation of policy papers (L above) has been referred to above. Link-people may also serve as an important point of liaison between people who are looking at policy issues and the EMIE service. As the computerized service develops it may be possible to offer a systematic selective dissemination of information (SDI) service to different groups of users but this will require very careful monitoring of the impact of services offered.

9. CONCLUSION

If the EMIE service is to succeed, ways must be found to encourage Education Officers to make more systematic use of information. Even more importantly, great care must be taken to ensure that the services offered fit into the normal work pattern of the recipients. To this end, efforts must be made to gain greater understanding of how Education Officers use information in their work and of the factors which influence their use of information. The observation work provided a useful beginning, but these efforts must be continued as an integral part of the EMIE development programme.

David Streatfield May 1982

INFORMATION SERVICES OCTOBER 1981 - MARCH 1982

(Report to the Project Steering Committee, November 1981)

EMIE
EDUCATION MANAGEMENT INFORMATION EXCHANGE
The Mere, Upton Park, Slough, Berks, SL1 2DQ

Telephone 0753 23156
Project Head: David Streatfield
Principal Adviser: George Cooke

INFORMATION SERVICES OCTOBER 1981 - MARCH 1982

Guidelines for LEA link people on the operation of the EMIE service during the experimental phase, prepared on the basis of meetings with EMIE Consultants and link people in September/October 1981.

SUMMARY OF PROPOSALS

THEMES (pages 1-3)

The main proposals are:

- *that LEAs should submit information on the Project themes to EMIE (page 1 para. 4)*
- *that priority will be given to*

  falling school rolls and the management of contraction (page 1 para. 6) and transition from school to adult life, including education in the 16-19 age range (page 2 para. 7)
- *that EMIE should carry out a limited review of policy and practice relating to the Education Act 1980 (page 2 para. 8)*
- *that information should be collected on assessment of performance (page 3 para. 9), induction and in-service training of teachers (page 3 para. 10), special education (page 3 para. 11) and computers (page 3 para. 12)*

FORMATS AND AIMS (page 4)

Three types of service are proposed:

- *newssheets giving abstracts of LEA documents, news of LEA initiatives, topics of interest (para. 1.1)*
- *reviews or digests on particular themes (para. 1.2)*
- *enquiry service (para. 1.3)*

Various aims for the service are described (para. 2)

INFORMATION COLLECTION (page 5)

Criteria for selection are given (para. 1) as well as procedures for submitting documents (para. 2)

ADVERTISING EMIE (page 7)

Ways of promoting the EMIE service within LEAs are suggested.

EMIE INFORMATION SERVICES OCTOBER 1981 - MARCH 1982 : THEMES

INTRODUCTION

1. We give below our proposals concerning the EMIE themes, compiled on the basis of the two EMIE/LEA Link Meetings held in October 1981 and the EMIE Consultants Meeting held in September 1981.

2. On each of the themes we have indicated the type of activity we should like to undertake. In most cases this will be information gathering in order to respond to enquiries but on some topics we feel that written work by the EMIE Consultants or field visits by the Project Head to seek information would also be worthwhile.

3. We have drawn attention only to those aspects of the themes that appear to be most significant now. A more comprehensive breakdown of the themes was given in EMIE Link Paper 2 : EMIE themes, prepared for LEA Link Meetings in October 1981. The breakdown in that Paper is still valid and we would welcome information on any of the subdivisions listed.

4. The first step will be for LEAs to submit information on the themes to EMIE, either in the form of documents or by notifying us of their current interests and queries, so that we can begin to establish a database.

PROPOSALS

5. Priority themes

5.1 Great emphasis has been placed on three of the broad EMIE themes: falling school rolls and the management of contraction; transition from school to work; and education in the 16-19 age range. Many participants in our meetings have expressed concern about youth unemployment and the role of LEAs and schools in YOP and related schemes. The 'new training initiative' and the need for better coordination of education, training and employment opportunities for young people were also seen to be important issues.

5.2 We therefore propose that during the experimental phase EMIE should concentrate particular attention on these areas, and given the overlap between '16-19 education' and 'transition from school to work' we would suggest merging these two themes under one heading.

5.3 We also note a continuing concern with the school curriculum and have responded by highlighting curriculum matters under 'falling school rolls' and 'assessment of performance'.

5.4 Our meetings brought home the fact that the EMIE policy themes need to be viewed against a background of budget constraint. We hope to reflect this concern by making financial cuts a focus for written work by EMIE Consultants. (See 6.4)

6. Falling school rolls and the management of contraction

6.1 Proposed EMIE activity: *information gathering by EMIE staff and written work by the Consultants.*

6.2 Main concerns: *staffing policies;*
protection of the curriculum;
curriculum-based staffing.

6.3 As mentioned in 5.4, the budget was a priority concern for a number of authorities. Discussion with the EMIE Consultants also suggested that attention should be given to the effects on education resulting from contraction and financial cuts.

6.4 We therefore propose limited case-studies by the EMIE Consultants, illustrating different methods adopted by a sample of LEAs in achieving cuts, and attempting some conclusions about the varying impact in educational terms. We suggest that the studies examine the effects of contracting resources on the curriculum; staffing policy; non-statutory services and ancillary and support services.

7. Transition from school to adult life (includes 'Transition from school to work' and 'Education in the 16-19 age range').

7.1 Proposed EMIE activity: *information gathering and field visits.*

7.2 Main concern: *the role of LEAs and schools in YOP and related measures to improve work preparation or alleviate youth unemployment.*

7.3 Other concerns highlighted: *new national initiatives on 16-19 education/training provision;*

school/FE links;

school/work relations and school/industry links;

tertiary organisation/reorganisation;

provision for young people with special needs.

7.4 We propose that fieldwork by the Project Head during the experimental phase should include LEA visits to gather information about policy developments and initiatives concerning LEA responses to youth unemployment.

8. Education Act 1980

8.1 Proposed EMIE activity: *information gathering by EMIE staff and written work by the Consultants.*

8.2 Main concerns: *publication of information; appeals procedures.*

8.3 Since a number of authorities have expressed concern about the implementation of the provisions of the Act, we propose including this as a new EMIE theme. We suggest collecting documents which illustrate policy and practice with regard to admissions appeals and publication of information, including samples of information prepared for parents. We propose that the EMIE Consultants review the documents received, producing a digest of policy or problem issues and a comparison of approaches to the provision of information for parents.

9. Assessment of performance

9.1 Proposed EMIE activity: *information gathering;*

9.2 Main concerns: *school self-assessment;*

curriculum assessment (in the light of DES Circular 6/81).

10. Induction and in-service training of teachers

10.1 Proposed EMIE activity: *information gathering.*

10.2 Main concerns: *staff development policy;*

trend towards school-based INSET.

10.3 Other concerns highlighted: *self-evaluation;*

training for multi-cultural education;

training in microtechnology.

11. Special education

11.1 Proposed EMIE activity: *information gathering.*

11.2 Main concern: *progress towards integration and involvement of mainstream schools.*

11.3 Other concerns highlighted: *transition to adult life;*

appeals committees;

provision for pupils with behavioural problems;

assessment procedures;

parental involvement;

need for in-service teacher training.

12. Computers

12.1 Proposed EMIE activity: *information gathering.*

12.2 This topic provoked less discussion and prompted fewer specific requests for information services, perhaps because for some LEAs it is an area where familiarity is only just beginning to grow. It seems clear however that EMIE should have a role in collecting and disseminating information on:

12.3 *policy relating to educational applications of microtechnology;*
administrative uses of computers (mainframe as well as micro).

EMIE INFORMATION SERVICES OCTOBER 1981 - MARCH 1982 : FORMATS AND AIMS

1. Types of service

We propose that the following *types* of information service should be offered during the trial period:

1.1 *Newssheet giving a) abstracts of LEA policy documents;*

b) brief details of LEA initiatives on EMIE themes;

c) notice of topics where documentation needs to be collected.

(Depending on the quantity of relevant information, these three elements may be included in one newssheet or form three separate issues).

1.2 *Review or digest concentrating on a particular theme.*

(See proposals for written work by Consultants).

1.3 *Enquiry service, providing loan copies or photocopies of relevant documents and/or details of suitable contacts in LEAs or 'associate information centres'.*

2. Aims of the service

We note the following helpful comments from LEA link people concerning the *quality* of information service they would like to see and *benefits* they would hope to gain:

EMIE should aim to:

2.1 *Provide information on how LEAs are coping with problems or issues of mutual concern, to enable authorities to learn from experience elsewhere;*

2.2 *Provide links between named individuals in LEAs facing similar problems;*

2.3 *Identify LEAs and key personnel within them who have substantial experience or expertise in particular areas of concern;*

2.4 *Disseminate information on useful practice;*

2.5 *Offer authoritative reviews on major policy areas;*

2.6 *Anticipate future policy questions;*

2.7 *Provide a quick, efficient, regularly updated information service;*

2.8 *Provide an advisory service through the link with EMIE Consultants;*

2.9 *Increase LEA awareness of new technology for the storage and retrieval of information.*

EMIE INFORMATION SERVICES OCTOBER 1981 - MARCH 1982 : INFORMATION COLLECTION

1. Information collection

The following guidelines have been offered concerning the type of information that would be useful to EMIE:

1.1 *Current relevance, regardless of the age of documents, is the main criterion;*

1.2 *Documents which illustrate local practice and indicate policy implications will be helpful;*

1.3 *Documents considered 'ephemeral' may well be crucial in topic areas where there is rapid change. EMIE aims to update regularly;*

1.4 *Documents considered 'management information' by one authority could well be useful 'policy information' for another;*

1.5 *Information on policy initiatives which were unsuccessful or were not finally approved or were not implemented, can be useful;*

1.6 *Documents illustrating the policy formulation process may be helpful;*

1.7 *Since the service is asked to be 'anticipatory' it will be useful to learn of initiatives in the early stages of development and where possible to be notified of important concerns even before they are documented.*

2. Submission procedures

The pro forma headed 'EMIE Document Service' enables people to give details concerning:

2.1 *level of confidentiality of documents submitted.*

2.2 *status (i.e. what stage the documents have reached in the decision-making process).*

2.3 *individual(s) who may be contacted for further information.*

2.4 *significance of documents; important points to note.*

EMIE
EDUCATION MANAGEMENT INFORMATION EXCHANGE
The Mere, Upton Park, Slough, Berks, SL1 2DQ

DOCUMENT SERVICE

Please complete a copy of this sheet and attach to each document submitted to EMIE.

1. **Link person** .... 2. **LEA**.........................

3. **Title of document**

....

4. **Date of document** ....

5. **Confidentiality:** completely open? ☐

open to LEAs only? ☐ *(Please tick where appropriate)*

open to EMIE staff only: not for circulation or publication without provider's permission? ☐

6. **Status (what stage has the document reached in the decision-making process? When is it likely to become out of date?)**

7. **Contact (please give the name(s) and job titles(s) of the individual(s) responsible for preparing the document or for carrying out the work described)**

....

....

....

8. **Notes on content (no abstract required, but you may wish to explain briefly the significance of the document and to draw attention to its major points)**

Sponsored by the Department of Education and Science, the National Foundation for Educational Research

EMIE INFORMATION SERVICES OCTOBER 1981 - MARCH 1982 : ADVERTISING EMIE

Role of LEA link people in promoting the service within their authorities

1. To assist LEA link people in promoting awareness and use of EMIE services, the introductory leaflet "Using the EMIE service" has been prepared, explaining how EMIE operates.

2. The two main mechanisms suggested for introducing EMIE within educatio departments were:

2.1 An initial, general explanation and circulation of the introductory leaflet during a meeting of Senior Officers;

2.2 Follow-up meetings with staff involved in work relating to EMIE themes.

3. The following ideas were also put forward:

3.1 A leaflet produced by the individual authority relating EMIE to its own circumstances;

3.2 Making EMIE a standing agenda item at regular Senior Officers' meetings;

3.3 Using an example of a successful enquiry response to promote the service;

3.4 Making arrangements for appropriate EMIE papers to be considered at policy group meetings;

3.5 Gaining the Chief Education Officer's support for the service;

3.6 Circulating EMIE newssheets to Officers and Advisers.

David Streatfield
Sue Thompson
October 1981.

EMIE
EDUCATION MANAGEMENT INFORMATION EXCHANGE
The Mere, Upton Park, Slough, Berks, SL1 2DQ

Telephone 0753 23156
Project Head: David Streatfield
Principal Adviser: George Cooke

USING THE EMIE SERVICE

EMIE is a new range of services aimed at Education Officers and Advisers in Local Education Authorities. These include an enquiry service, a document clearing house and a means of identifying useful contacts in other LEAs. We exist to help LEA staff exchange information about educational policy issues and useful practice. If you are interested in what other people are doing about education issues please use the new services and contribute to them.

How to use EMIE

The enquiry services are free to LEA users. Simply contact the EMIE staff by telephone or in writing. EMIE staff will search their document collection and other information sources, seek out information, provide named contacts and involve specialist consultants as required. Your feedback will be crucial if the service is to meet users' needs, so please tell us whether you find our responses helpful and suggest how they might be improved.

How to contribute to EMIE

Each LEA has been asked to nominate a link-person to act as a point of contact within the LEA and as a channel of communication. Link-people will seek out documents for EMIE and provide information about interesting developments and emerging problems. If you are doing work which you think may interest EMIE please contact your link-person.

Contributing documents

The new service can handle all types of documents including 'sensitive' material. Your link-person can tell you the simple restrictions which can be applied to confidential documents added to the EMIE collection. These restrictions will ensure that you retain control over the documents.

(People who were involved in the pilot study for this project may be relieved to know that abstracts are no longer required.)

A six-month experiment

Your Authority is one of thirty participating in the 'experimental phase' of the new service, leading up to the official opening next March. During this phase various ideas are being tested and a document collection is being assembled. Our response to enquiries may not be as comprehensive in this test period as we hope to achieve later but please try us and see!

Project themes

EMIE will concentrate on seven broad subject themes for the time being but these will be reviewed as the project develops. The themes are listed on the attached sheet. Following talks with the link-people it has been agreed that for the next few months EMIE staff will concentrate on:

- *the transition from school to adult life including education in the sixteen to nineteen age range (with special emphasis on the role of LEAs in YOP and related schemes);
- *falling school rolls and the management of contraction (especially staffing policies; curriculum protection; the educational effects of cuts).

EMIE contacts

David Streatfield - (Project Head)
Sue Thompson - (Senior Research Officer)
Chris Jackson - (Project Secretary)

Address: EMIE : NFER, The Mere, Upton Park, Slough, Berkshire, SL1 2DQ
Telephone: (Slough) 23156

This information is current until 31st March 1982.

EMIE THEMES

* **Falling school rolls and the management of contraction:**
    - staffing policies;
    - protection of the curriculum;
    - curriculum-based staffing;
    - financial considerations;
    - support and special services;
    - institutional reorganisation/closure;
    - development/use of buildings;
    - forecasting pupil population;
    - relationships with parents and community.

* **Transition from school to adult life (including 16-19 education/training):**
    - role of LEAs and schools in YOP and related measures to improve work preparation or alleviate youth unemployment;
    - new national initiatives on 16-19 education/training provision;
    - tertiary organisation/reorganisation;
    - school / FE links;
    - school/work relations and school/industry links;
    - provision for young people with special needs;
    - careers education;
    - coordinated development across the field of education, training and employment;
    - recreation/leisure provision.

* **Education Act 1980:**
    - publication of information;
    - appeals procedures.

* **Assessment of performance:**
    - school self-assessment;
    - curriculum assessment;
    - pupil assessment methods, including school-leaver assessment, 'profiling', etc.;
    - administration of the new 16+ examination;
    - assessment changes in the light of microtechnology.

* **Induction and in-service training of teachers:**
    - staff development policy;
    - trend towards school-based INSET;
    - performance monitoring/self-evaluation;
    - training for multi-cultural education;
    - training in microtechnology;
    - teacher induction policy.

Cont'd

- **Special education:**

  progress towards integration and involvement of mainstream schools;

  transition to adult life;

  appeals committees;

  provision for pupils with behavioural problems;

  assessment procedures;

  parental involvement;

  need for in-service teacher training;

  interprofessional cooperation;

  services for the under-fives and their parents;

  funding and relationships between the three levels of central government, local government, and institutions.

- **Computers:**

  policy relating to the educational applications of microtechnology;

  administrative uses of computers (mainframe and micro).

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REVIEW OF THE ROLE OF EMIE CONSULTANTS

(Report to the Project Steering Committee, November 1984)

REVIEW OF THE ROLE OF EMIE CONSULTANTS: PAPER PREPARED BY MR. BRIAN KAY ON BEHALF OF THE EMIE CONSULTANTS

1. The intended role of the Consultants was set out in a paper approved by the EMIE Steering Committee in June 1981. The role was described under four headings -

   a) Quality control - reviewing the papers received from LEAs and advising on the ways in which they might be used.

   b) Enquiries - helping the full-time staff in dealing with enquiries from LEAs on specific subjects.

   c) Producing written material.

   d) Identifying good practice.

   To these might have been added a fifth -

   e) Giving the team some guidance about likely priorities.

2. The last of these was initially of considerable importance and a substantial area of discussion in some of the earliest meetings concerned the priorities within the broad themes initially determined for EMIE. The Consultants' spread of very recent experience within LEAs, DES and H.M. Inspectorate meant that there was a good chance that they as a group might be able to identify the sorts of questions that were likely to emerge, and their advice made it easier for the team to be prepared in advance to cope with these. Events have justified the choice of such issues as the impact upon schools, and especially schools' staffing and curriculum, of financial cuts combined with falling rolls, the working out of the implications of the 1980 and 1981 Education Acts, transition from school to work, and special education in the 16-19 range.

   This is a function which over the first two years of the Consultants' work has been progressively less important for three main reasons -

   a) The sensitiveness to emerging issues becomes dulled as the date of the Consultants' retirement recedes into the past.

   b) Consultative arrangements with LEAs have steadily strengthened and deepened and much more direct advice from those who are in the thick of things is now available.

   c) The full-time members of the team themselves have rapidly developed their own sensitivity to issues likely to become important.

3. Of the four tasks originally identified for the Consultants, the third has perhaps made the most impact. Where a body of useful material has been assembled from LEAs, which is too diverse and too bulky for it to be easily assimilable by busy LEA officials, it is very useful for short papers to be written identifying the more significant points and indicating where more detailed information can be obtained if required. The first round of such papers, which included 'The Education Act 1980' and 'Falling School Rolls and Resource Constraints', raised several questions which have given rise to discussion -

a) How long should papers be? All the evidence is that, to be of maximum value, they need to be as short as possible, provided that they cover the topic adequately. Early papers erred perhaps on the side of being too long.

b) How specific should they be? Blurred generalisations are not of very great value to the user, and the writers need to combine a fair degree of specificity and precision with the need to avoid unnecessary detail - an uneasy tightrope to walk. The use of references to detailed material available through EMIE could help in preserving this balance.

c) What time scale is relevant? Here it is clear that speed is important and that a less than complete paper available when needed is better than a more polished version available only when the need has passed.

d) Should the papers be wholly objective? In at least one of them it was decided to include the personal comment of the Consultant as well as the objective account of LEA policies - and that seems to have been welcomed, provided the facts and comments are clearly distinguished.

The second wave of papers is now being prepared by Consultants and early drafts suggest that they will be shorter and sharper than some of the earlier ones. A perennial problem is shortage of material - it is not worth attempting a synthesis without a respectable body of information to work on. Sometimes this is readily available, sometimes it can be stimulated (either by a broad request or by a brief "questionnaire") but without it the Consultant's task can be a frustrating one. This issue is discussed later in the report.

4. The identification of good practice is a task which initially Consultants were well placed to carry out, particularly in areas of education in which they had worked or in which they had a personal interest. Knowing where to look for good examples of (say) tertiary colleges, or teacher induction procedures and/or knowing a name and telephone number which might lead to further information can

4. Cont'd.

be a great help to the team and can short-circuit an otherwise time-consuming task of enquiry. As with some of the other tasks, it is one in which Consultants' greatest contribution is likely to be made in the first year or so of their involvement. In a situation which changes fairly rapidly, their experience and knowledge is likely to be a fairly rapidly declining asset, except insofar as they are able to maintain the personal contacts that they had before retirement.

5. The task of helping the team in dealing with enquiries has been a limited but useful one - but one which may well be diminishing in importance as the full-time staff have built up a very impressive personal knowledge of many areas of education in which enquiries are made, and have created an effective retrieval system for the information that they have received from LEAs. It is now perhaps mainly in areas which are inadequately supplied with LEA documentation that Consultants may still be able to help from their own knowledge and experience.

6. The first task, which the Steering Committee may well have considered the most important, has been left to the last here because in practice it has turned out to be the least frequently required. It was envisaged that Consultants would help the team to decide in relation to documents received from LEAs how far

   a) they were significant enough for abstracting and active dissemination;

   b) they merited abstracting and perhaps retention but not dissemination; or

   c) they had some relevance that should be simply listed rather than abstracted.

   This task is incidentally one which depends less on Consultants' recent experience and more on skills of discrimination and assessment acquired in the course of their working lives. Two reasons why Consultants have not been used greatly in this process are -

   a) In general the flow of papers from LEAs has been perhaps less than envisaged, so that selection of the most important has not been a major task. In some LEAs where there may have been some failure of communications, especially involving the 'link persons' and their concept of their job, relevant papers have not automatically been sent to EMIE - or even perhaps identified as appropriate. Other LEAs may have carried out their own quality control and sent only papers they judged to be of self-evident importance.

6. Cont'd.

b) EMIE staff have been able to carry out their own quality control. An experiment in which EMIE staff and Consultants independently identified the main facts to include in a series of abstracts of LEA papers showed very close agreement.

7. Looking forward to the future, there seem to be a number of points that need to be considered -

7.1 Since the Consultants' work and indeed EMIE's work depends on the continual flow of relevant papers from LEAs, perhaps LEA link people ought to be encouraged to explore more automatic procedures which would ensure this flow. If papers were then channelled through the link person, he or she could select out the minority of papers which were obviously of little use to EMIE, before sending on the majority to EMIE where second selection - possibly involving the Consultants - could take place. At present the flow of papers is too thin, too uncertain and too patchy (some LEAs have sent very little if any).

7.2 Too small a proportion of the papers received arises from the crucial early stages of the policy formation when issues are at their most sharp, and opposing points of view are clearly to be seen. Most belong to the later 'semi-public' stage when compromises have been agreed upon and some form of synthesis of different views achieved. Policy makers in LEAs would be more helped and Consultants would be able to identify issues more sharply if the earlier documents were available - though it is easy to see many reasons why this may not always be possible.

7.3 It is necessary to consider how far the Consultants should be purely reactive - available to be used as needed and to respond to requests for advice or comment and analysis of papers received from LEAs, or whether they should also take an initiative, through the team, in stimulating the sending of material by LEAs on specific subjects. The circulation to LEAs of guidelines or questionnaires to guide responses is a further stage in this direction and should certainly be used with extreme moderation, because of the additional burden it can place on LEAs.

7.4 There is a 'chicken and egg' problem relating to LEA material. Material tends to flow when a number of LEAs feel the need to grapple with an issue, and so generate papers. And yet this is just the time when they will wish to see papers from other LEAs. There is almost bound to be a time-lag which can only (partially) be obviated if EMIE anticipates such issues and stimulates the early communication of appropriate papers.

7.5 Apart from their wider educational experience, each Consultant brings to EMIE his or her own specialism(s) or

7.5 Cont'd.

special interests and this is an asset to be drawn upon. There is much to be said for trying to secure a spread of interest among new appointments to cover the most likely areas of development.

7.6 The Consultants still have a contribution to make to forward planning, in particular through the discussion at Consultants' meetings. But those are fairly infrequent and direct contacts with LEAs, and in particular with SEO, are likely to assume greater importance in this respect. Otherwise, meetings of Consultants may need to be held more frequently.

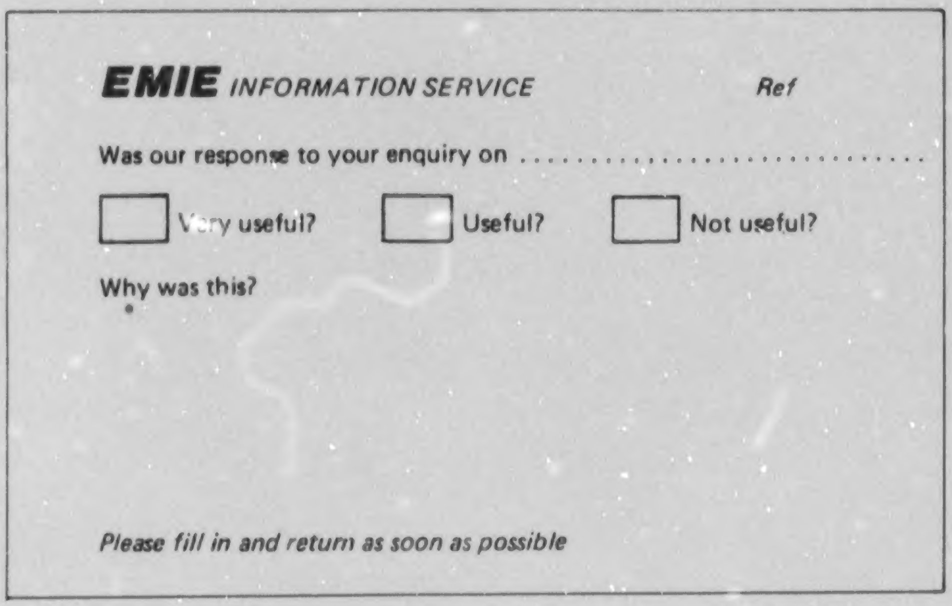
7.7 Although it is clear that a number of LEAs make good use of written material, they will only continue to do so while it remains up-to-date. It may be necessary in future to use Consultants to check and up-date existing material on a regular, possibly annual, basis. From time to time it will be necessary to recommend the withdrawal of a document either because the issue is dead or because so much has happened that a new paper is required.

7.8 In the light of all the points raised above, the size of the Consultants' group will need to be reviewed from time to time to match the changing work-load. This is the more possible because of the relatively short contracts of appointment for Consultants.

Brian Kay
November 1984

APPENDIX D

REPLY POSTCARD



EMIE *INFORMATION SERVICE* *Ref*

Was our response to your enquiry on ....

☐ Very useful? ☐ Useful? ☐ Not useful?

Why was this?

Please fill in and return as soon as possible

EVALUATION OF EDUCATION MANAGEMENT ABSTRACTS NO. 3

(Report to the Project Steering Committee, November 1983)

Education Management Information Exchange (EMIE) Project. An evaluation of EMIE education management abstracts no.3, 1983.

1. INTRODUCTION

It was always the intention of the Project to undertake case studies of the use made of the abstracts and enquiry services, in order to provide a qualitative assessment to complement the quantitative assessment available through routine statistical monitoring.

Mr.Ian Kissane of Sheffield University Department of Information Studies expressed an interest in studying the EMIE abstracts service for his MSc in Information Studies dissertation, and accordingly an evaluation study, based on the third issue of Education management abstracts, was carried out in June/July 1983.

2. METHOD

Letters were despatched to 15 LEAs, together with documents requested from the third abstracts bulletin. The letters alerted the enquirers to the intention to arrange 20-minute telephone interviews with the recipients of a number of selected documents (up to three per request).

Two officers, in Bradford and Sheffield LEAs, kindly enabled Mr.Kissane to visit them in order to gain some insight into the work style of the people he would be interviewing. He was also able to obtain their reactions to the draft questionnaire prepared for the telephone interviews. As further preparation, Mr.Kissane carried out a 'mock' interview with a member of staff at NFER.

The interview questionnaire (summarised in the Appendix) was designed to elicit information or comment on the following:

(i) the recipients - their job titles and length of time in post;

(ii) the background to their request for papers - what situation led to the request, what factors influenced the selection, etc.;

(iii) the way in which the documents were used;

(iv) the abstracts bulletin - comments on appearance, content, mechanism for distribution within the LEA;

(v) link people - their role

(vi) response to other EMIE services, including the enquiry service.

3. SAMPLE

15 interviews were conducted with officers and advisers from the following 12 LEAs: Bradford, Buckinghamshire, Cleveland, Derbyshire (2), Hounslow, Humberside (2), Lincolnshire, Rotherham, Sheffield, Surrey (2), West Glamorgan and Wolverhampton. The 15 posts included in the survey are listed below, with length of service:

Job title	Length of service in post
Assistant County Education Officer: Building and Planning	3 years and 6 months
Assistant County Education Officer	5 years
Assistant Director: Nursery and Primary	2 years and 6 months
Assistant Education Officer: Further and Community	2 months
Assistant Education Officer: Further Education, Colleges and Awards	5 years
Assistant Education Officer: Special Education	13 months
Assistant Education Officer	3 months
Principal Administrative Officer: Resources and Administration	5 months
Professional Assistant to the Director of Education	2 months
Area Education Officer	2 years and 3 months
General Primary Adviser	4 years
Adviser on Special and Remedial Education	12 years
District Adviser (Psychologist)	8 years and 6 months
Staff Training Officer	10 years
Director of Youth Service Review	4 months

4. INTERVIEW REPORT

The following summarises the main findings of Mr.Kissane's report:

4.1 Background to requests for documents

Common reasons for requesting documents from the abstracts bulletin were to find out how other LEAs coped with similar problems, implemented similar policies, or prepared certain types of reports. The two most frequently cited 'background' situations were:

a. the authority is reviewing its present policy with a view to updating it or checking that nothing has been overlooked in the approach adopted;

b. the authority is in the process of initiating a new policy.

Examples:

- * *LEA trying to bring more coherence into its policy on support for schools with significant numbers of ethnic minority children. Requests paper on multicultural education.*

- * *officer responsible for special education, interested to see what kinds of papers other LEAs are putting to their committees, with regard to additional resources to implement the 1981 Education Act. Requests papers on staffing implications of the 1981 Act.*

- * *LEA wanting to update policy on 16-19 education in the light of MSC programmes. Considering a '14-19' policy. Requests papers on expansion of post-16 courses; pre-employment project; lower attaining pupil project.*

4.2 Factors that influenced requests

In most cases, the enquirers' selection of documents was not influenced by which LEA produced them, though three respondents stated that they were seeking information from LEAs geographically or demographically similar to their own. As one would expect, relevance of subject matter was always the principal concern.

4.3 Other sources of information used

Most respondents stated that, in their search for information, they had made use of a variety of other sources (such as colleagues, other LEAs, local authority associations, libraries and research institutions, etc.), in addition to EMIE. Frequently, the respondent's own authority was seen as the most important source, but apart from this, there was no attempt to pass judgement on the relative significance of other information providers.

4.4 Value of receiving information from other LEAs

Since the EMIE service is founded on the assumption that LEAs can benefit from exchanging information with other LEAs, it was thought important for the interviewer to question respondents on this.

Mr.Kissane felt that the views expressed were well represented in the following comment from an Assistant Education Officer:

> *" ... it is not crucial, but important ... in a sense, we have to go ahead in our own context ... though it is at the same time ... very valuable to know how other LEAs are dealing with the same issues."*

In addition, information from other LEAs was valued for the following purposes:

- *giving reassurance (that other LEAs are developing along similar lines or experiencing similar problems)*
- *drawing attention to likely pitfalls*
- *helping to crystallise thinking, particularly in the preparation of reports*
- *providing a 'reference point' against which ideas can be checked*
- *widening perspectives*
- *helping to combat isolation*
- *giving contacts to follow up*
- *illustrating examples of practice which might support an officer in arguing a case.*

It was noted that in cases where departmental policy on a given issue was already established, information from other LEAs was seen as useful for the purpose of reassurance or comparison. By contrast, where LEAs were moving into new areas of policy or re-thinking old ones, information from other authorities was valued more highly as a source of ideas.

4.5 How the selected documents were used

The majority of the sample had used their EMIE link person as an intermediary in obtaining their selected documents. All expressed satisfaction with the speed of the service. Many gave generous praise: "quick service", "impressed", or "pleasantly surprised".

Most respondents stated that they had scanned or read their selected documents quickly; four reported reading them thoroughly on receipt; and four had read parts of the document thoroughly, or intended to do so.

Most respondents felt that the documents had contributed to work in hand or to their general stock of knowledge. In two cases, respondents thought that the information received might influence future action by their authorities. In another instance, an officer suggested that a paper from EMIE on the Youth Training Scheme had influenced his thinking and was already helping him in talks on YTS in his own authority.

4.6 The abstracts bulletin

Most respondents were satisfied with the appearance and length of the abstracts bulletin and felt that one bulletin every three months would be about the right frequency. Some respondents could not recall in detail the appearance of the bulletin: usually this was because it had to be passed on after receipt and officers did not retain their own copy. There was general satisfaction with subject coverage, but two officers expressed the view that there was insufficient material on primary education.

With regard to the way in which the bulletin was used, 10 respondents either scanned the contents or read only those sections relevant to their work. Five respondents stated that they read the bulletin thoroughly, one of these commenting that it provided him with "a source of background information on a wide range of subjects, which is useful in my job as I have a wide range of responsibilities". Several respondents indicated that they valued Education management abstracts as a current awareness tool; one for example explained: "It is essential to keep a finger on the pulse of what is happening across the country".

All of the respondents stated that they would continue to use the bulletin.

Some officers and advisers asked for a better indication, within the abstracts, of how much detail the source documents contained. It was also suggested that EMIE should try to include more discussion papers in the bulletin, rather than relying almost entirely on committee documents.

4.7 Role of link people

Only one person in the sample was an EMIE link person. It was his practice to read the abstracts bulletin, to make an initial assessment of the items that might interest his colleagues, then to circulate the bulletin and receive colleagues' requests to pass on to EMIE. When the documents arrived, he prepared an acquisitions list to inform the department of material available. Individual abstracts were extracted from the bulletin and attached to the acquisitions list.

Other respondents commented on the effectiveness of the 'link person' system. Only 5 respondents had been informed about EMIE by their link person; others had learned of EMIE through press information, conference attendance, or simply receiving a copy of the bulletin. One respondent reported that the EMIE link person in his authority raised EMIE matters at senior management meetings and another mentioned that his link person had arranged for colleagues to attend EMIE courses. In most cases, link people did not seem to be very 'active', and one respondent commented bluntly: "I didn't know he was our link person. I certainly hadn't heard a whisper from him on the subject".

4.8 Comments on the EMIE service

The most significant finding to emerge from this part of the questionnaire was that none of the respondents had used the letter and telephone enquiry service and for some, the abstracts bulletin was the only aspect of EMIE that had come to their attention.

5. CONCLUSIONS

The abstracts evaluation has been useful to Project staff in a number of ways, but principally in:

- giving some definition to the otherwise hazy area of what prompts education officers and advisers to request documents from EMIE;
- indicating how the bulletin is used (and drawing attention, in one case, to a long delay in circulation within the authority);
- attempting to classify the use to which the selected documents are put.

A number of findings are relevant to the way in which the EMIE information service may develop in future, but perhaps four of these have particular importance:

- *LEA committee documents may be limited in their usefulness and for some purposes working papers and discussion documents - at present a very small proportion of the EMIE database - may be more helpful;*
- *EMIE policy on subject coverage may not be widely known and there is an expectation that many policy areas will be included in the abstracts bulletin;*
- *users of the bulletin may not be aware of the existence of an enquiry service. In addition to improving the publicity for the*

enquiry service, EMIE staff may therefore need to be more 'active' in following up abstracts requests, clarifying interests and ensuring that the most appropriate information is provided;

- *EMIE link people may not always be playing a very active role in informing colleagues about the range of EMIE services and activities.*

ST
November 1983

EMIE: evaluation of Education management abstracts, June 1983.

QUESTIONNAIRE SUMMARY

The following summary indicates the main topics discussed during Mr.Kissane's telephone interviews:

1. Respondent's job: official job title; length of time in post.

2. The selected documents

   a. background to the request (ie the problem/interest/ work area which gave rise to the request);

   b. how the documents fitted into this background;

   c. whether enquirer was influenced by the matter of which LEA produced the documents, and if so, in what way;

   d. whether other factors influenced the choice;

   e. what other sources of information were used in relation to the problem/interest, and which source proved most useful;

   f. how vital it was to have information from other LEAs on this occasion.

3. Use of the selected documents

   a. whether respondents had had an opportunity to use the documents;

   b. whether they were read thoroughly, scanned, filed, or passed on to someone else;

   c. whether the documents contributed to the work in hand, or whether they simply contributed to 'general stock of knowledge';

   d. whether the documents contributed to any direct action taken by the LEA, and if so, how;

   e. whether the documents arrived in time to be useful.

4. EMIE abstracts bulletin no.3 and other bulletins
    a. by what method the bulletin was acquired (e.g. rota system, via link person);
    b. whether general appearance of the bulletin was satisfactory (e.g. layout, print);
    c. length of the bulletin;
    d. frequency;
    e. subject coverage;
    f. length of the abstracts;
    g. value of the abstracts as 'document substitutes';
    h. whether the bulletin was read thoroughly/scanned/passed on;
    i. interest in continued use of the bulletin.

5. Question to EMIE link people: how they see their role.

6. Question to other officers/advisers: how EMIE was brought to their attention (e.g. press reviews, link people, personal recommendation).

7. Use of the EMIE telephone and letter enquiry service

8. Contribution of EMIE service to respondent's work

REPORT ON EMIE ENQUIRY CASE STUDIES

(Report to the Project Steering Committee, November 1984)

Report on EMIE enquiry case studies prepared through telephone interviews during August 1984. Report by the Project Head and the Information Development Officer.

1 INTRODUCTION

Fourteen telephone interviews were held with education officers who had used the EMIE enquiry service between late May and early August 1984. The interviews were conducted in August by the new Information Development Officer after a short period of preparatory training (the interview schedule is reproduced as appendix 2). Fifteen people were selected for interview using the substantial nature of the enquiry as the main criterion. One potential respondent declined to be interviewed because he was still in the process of using the material supplied by EMIE (on curriculum-led staffing).

The aims of the interviews were to learn something about the context in which EMIE enquiries are generated, why people contact EMIE, what they think of the service and what use they make of the information provided. Clearly a limited survey of the kind described in this report can only be indicative in character, but is potentially helpful to the EMIE staff in showing how some education officers come to make use of the service. A full-scale survey of a random sample of users was beyond the resources of the Project and may not have provided a commensurately better picture of contact with EMIE.

2 THE RESPONDENTS

Four of the respondents were first-time users of the EMIE enquiry service; the others had made previous (sometimes frequent) use of the service. It is difficult to equate the titles of professional posts across LEAs but eight respondents were Assistant Education Officers or appeared to have at least equivalent rank, two held specialist posts (Computer Development, Consortia Development), two were Advisers and two were Professional Assistants. Eight respondents worked in county authorities, five were employed by metropolitan boroughs and one by a London borough. The years of experience in education administration reported by the respondents ranged between three months and almost 15 years - the mean was 5 years.

3 THE ENQUIRIES AND THE RESPONSES

The nature of the enquiries treated in this survey, the reasons for approaching EMIE, whether other agencies were approached, the usefulness of the information received from EMIE and the use made of the information, are described for each enquiry in appendix 1. All the respondents replied positively to questions about the service received from EMIE although some made constructive criticisms. Most enquiries came about because the education officer was faced with a new problem or area of work and wanted to know how other LEAs had responded to that issue, usually at relatively short notice. EMIE invariably replied quickly and in all cases provided some useful information. Some respondents (the term 'enquirer' has been adopted in appendix 1) would have perferred to receive a 'state of the art' report on what all or most other LEAs were doing in relation to a topic. However, it was readily recognised that EMIE was providing the kind of contact making and information collecting function that education officers themselves perform, but more systematically than they could manage themselves. Many respondents felt that EMIE could provide information from a selection of authorities more quickly (and usually from a more representative selection of LEAs) than they could manage by direct contact. The overall effect was to save them time and to provide models of more or less direct relevance to the problems in hand. It is noticeable that the responses from other agencies were usually less directly appropriate and more 'publication-based' than those from EMIE. The contacts provided by EMIE appeared to be particularly welcomed by some respondents.

The fact that new issues,of the kind that inspired most of the enquiries looked at in this survey,are not a daily occurrence for an education officer reinforces the argument for continuously reminding LEA staff of the existence of EMIE,so that contact is made when the new issue does occur.

EMIE does not yet offer a full 'selective dissemination of information' service to education officers or LEAs but the appreciation shown by two respondents who received information over time in relation to their enquiry suggests that this idea should be pursued if and when resources allow.

4 DISCOVERING EMIE

The respondents had learnt of the existence of EMIE in various ways (some people mentioned more than one way):

- through colleagues	5
- by seeing EMIE publications or responses to other enquiries	4
- at SEO regional presentations	3
- as EMIE link person (or former link person)	3

Awareness of EMIE also came about through reading an item in Education, seeing an EMIE survey, through the SEO, through EMIE contact with the LEA, and "not sure" but possibly through the link person (one mention each).

Five people mentioned that their link people tried to promote the services in various ways and two others were current (and active) link people. However, three other people said that they didn't know, or were unsure, how the link person promoted EMIE. Distribution of EMIE papers was mentioned by four respondents at this point in the interview and one of the link people said that he tried to draw the attention of the senior education management team to the services which EMIE could provide. He promoted it at education team meetings and circulated abstracts bulletins. He also prompted colleagues about EMIE in response to specific enquiries.

5 USING OTHER SERVICES

Seven respondents reported that they saw EMIE Education management abstracts and five of these had obtained documents through the back-up service. One other respondent had recently been asked if he wanted certain items in the most recent EMIE abstracts and another had obtained a particularly listed document. Two of the seven non-users of EMIE abstracts were very new to their departments (having been in post only three months).

Five people mentioned other forms of contact with EMIE. Three had attended training workshops, two had been to meetings of LEA link people, three had participated in EMIE open days, two had seen EMIE presentations at SEO regional meetings, and one mentioned participation in LEA Research Group activities (which were not organised by EMIE, but with which EMIE staff are associated). One of the open day participants added "I feel I know the people in EMIE very well", and one of the negative respondents said "I didn't know they (the EMIE activities) existed. I wish I had".

6 GENERAL COMMENTS

A number of comments about the enquiry service are included in appendix 1 but all of the respondents volunteered additional remarks at the end of the interview. These are given below:

INTERVIEW 1 (AEO Secondary)

"I think I filled in a questionnaire six or seven months ago where we said, speaking for a number of colleagues who work on the schools side, we found it excellent. Helpful people who are prepared to go out of their way to get the material you require". As to improvements he stated, "You've got to remind people what you're about and what you have ... updating, circulating authorities at regular intervals".

INTERVIEW 2 (Computer Development Officer)

"A sort of viewdata facility" was suggested.

INTERVIEW 3 (Principal Assistant, Staffing)

"I'm very, very impressed by the speed and wide range of material that has come forth from you. I really feel it's very satisfactory".

INTERVIEW 4 (Modern Languages Adviser)

"The use I've made of it has more than fulfilled my expectations".

INTERVIEW 5 (AEO, Special Education)

"When I've used the service it's been very good. I couldn't complain at all and if ever I needed any information the telephone service has been very prompt. I think there are certain difficulties with the service - and I understand this is why the Research Group has been set up - in that you tend to be responding to things other people have already been working on and therefore you get the documentation when people have completed it rather than in the inception period ... I suppose the Research Group will compensate for that ... I'd like to see an extension in the computer linkage idea".

INTERVIEW 6 (Assistant Director of Education, Schools)

"I think it's a service with tremendous potential but it needs to be developed further ... it's really up to LEAs and officers and I think it will develop. I'd be very sorry indeed, if the service didn't continue".

As to improvements he stated, "I don't think you can do it from the EMIE centre now ... I'm not convinced that link persons should always be involved in all the contacts between the authority and EMIE. I think that EMIE will be really successful when individual officers are directly in contact with EMIE on a regular basis. I think link persons will get in the way, eventually. On the other hand, they have a useful job to do with disseminating information ... in the brave new world of technology there will be ways into the EMIE data base with displays back in the office".

INTERVIEW 7 (AEO, Administration)

He felt that EMIE might conduct national trawls on various subjects and that this might ensure a more comprehensive store of knowledge on various topics.

INTERVIEW 8 (Professional Assistant)

He felt it would be logical at some future date to be able to tap in directly to our information or, at least, the index. He suggested some sort of PRESTEL or CEEFAX system.

INTERVIEW 9 (AEO, Schools)

He "hoped to see it continue in existence and grow. I think it's a very useful and valuable service and can certainly save an awful lot of time from our point of view by having this quick retrieval of information".

INTERVIEW 10 (Consortia Development Officer)

"One problem with information ... what hasn't been made available leads to incomplete records ... EMIE could be a little more active rather than passive ... there again, it depends on the authorities stumping up the documents".

INTERVIEW 11 (Secondary Adviser)

"What I have received from EMIE I have found outstandingly useful". The respondent went on to say that he had only just taken up this post having been a Deputy Headteacher in a comprehensive, and regretted that he had never heard of EMIE before. He felt he could have used the service in his school context if he had known about it.

INTERVIEW 12 (Senior Administrative Officer, Research Planning)

She "found it very welcome to have a forum for meeting colleagues of equivalent level in other authorities and there are one or two contacts I feel I can phone and have quite a friendly chat with: they are people that I met on the workshop at Coventry. It is very easy for people at my level to be very isolated in local authorities ... (it is) very welcome to have a means of contacting colleagues in other authorities and as far as the actual service goes I have found the response has been excellent ... very helpful indeed".

INTERVIEW 13 (Principal Administrative Assistant)

He was satisfied with the service he had received on this occasion.

INTERVIEW 14 (Administrative Assistant, Schools)

He thought it would be unfair to suggest any changes on the basis of his brief contact with EMIE.

The necessity to keep reminding LEA staff of the existence of EMIE and of the services on offer is readily acknowledged by EMIE as is the need to develop the service further and to seek to anticipate forthcoming educational issues. Various EMIE link people have performed their role more or less effectively and have adopted different approaches towards passing on enquiries and putting EMIE staff in touch with colleagues. The possibility of enlisting new forms of information technology to provide direct links with LEAs is being looked at by EMIE.

One difficulty reflected in the comments reported above and elsewhere during the interviews is that some education officers appear to be expecting EMIE to provide a comprehensive overview on key educational issues. This approach runs counter to that so far adopted by EMIE. At present EMIE staff usually attempts to reflect interesting policy and practice initiatives in various LEAs, rather than place a heavy burden on link people and others by pursuing the assessment of trends and the preparation of authoritative position statements. This approach may have to be reviewed in relation to the service offered after March 1985.

7 CONTINUATION OF EMIE

All the respondents said that EMIE should continue after March 1985 and some offered additional comments:

INTERVIEW 1

"I wrote strongly supporting that. It would be a great tragedy in my view if an organisation like that was not allowed to continue".

INTERVIEW 2

He felt that EMIE had been very useful in giving him an orientation into the world of educational administration. (Three months in post.)

INTERVIEW 4

"Good Lord, yes! Is there any reason why it might not continue? If you want a reference, quote me".

INTERVIEW 5

"Whenever I've got something to do which is new and I think that other people might have actually done some work on it, it seems a bit silly if I don't get in touch with EMIE to find out if there's any information".

INTERVIEW 7

Yes."You can only grow and develop. The information you get will improve and increase as time goes by. It will make things much more easy from our point of view".

INTERVIEW 8

This was "quite strongly the feeling within this department ... although we haven't made as extensive use of the system as we could,the use we have made has been very productive ... even if only to provide a wider and deeper background to problems that we can be facing". The bulk of their enquiries have been on "specific questions... needing short term answers rather than on-going problems" and "Sue or David have been more than helpful in coming up with a useful answer".

INTERVIEW 11

"As far as I am concerned, without a doubt".

INTERVIEW 13

"I think this is a useful service which should continue".

ACKNOWLEDGEMENTS

We wish to thank all the respondents for their cooperation in these interviews and to acknowledge the help of Ralph Tabberer, Senior Research Officer, NFER in the interviewer training activity.

DRS/JG
November 1984

Interviews with users of the EMIE enquiry service: their enquiries and the EMIE responses.

INTERVIEW 1

The enquiry concerned Section 11 funding.

The authority was looking at its use of Section 11 funding with the intention of developing a policy for the department. They have heavy concentrations of ethnic minority pupils in the borough. The enquirer had hoped to complete this paper as a holiday job for the Ethnic Minorities Advisory Group which reports to the Schools Sub-Committee. The question of what other authorities were doing had been raised there and the suggestion made that EMIE should be contacted. He had used the service once before and "found it very helpful indeed".

As well as contacting EMIE, the enquirer had approached the Ethnic Minorities Unit in the authority which involves itself with every department.

The information received from EMIE was "Very valuable. Sue not only sent me what she had, she contacted a number of authorities and as recently as 19th July (seven weeks after the enquiry) let me have some information from Brent, and it's been very useful; quite an eye-opener to have a look at what other people have been doing".

This information was provided in an appropriate form. "Copies of what other people have produced in report form, and it's been very useful". It had arrived in time (he had hoped to complete the exercise in June but had had to delay it); and if EMIE had not existed, he doubted whether he would have sought out this information. "I may have 'phoned Brent or the odd London borough but I don't think we'd have gone to the trouble - EMIE has co-ordinated a response. We've been able to contact one point. You've done a lot of hard work on our behalf".

Asked whether he would have liked to receive any other information, the respondent said "No, Sue Taylor has more or less winkled out everything that is available in other authorities. We're more than satisfied".

He was making use of the information supplied by writing a report at that time which would then go to his Deputy Chief Education Officer, to co-ordinate the policy response on behalf of all sectors of the education department.

INTERVIEW 2

The enquiry concerned property databases.

There were tentative proposals that there should be a property services department for the whole authority to deal with property matters for all departments. A property database was being developed by their computer services department. It was intended that basic records should be created and then the individual departments would expand them as needed. The specification was being designed for the database and the enquirer wished to look at the experience of other authorities.

He decided to use EMIE because "I always use it as a first point of contact for any type of enquiry as I've found it a useful source of information. It saves 'phoning other authorities. It is a central point of contact". The enquirer added that he had used the service three or four times before on fairly major topics (e.g. curricular-based staffing, student records).

The enquirer had not contacted any other agencies or individuals in this case. He had not yet had the chance to use the information. The matter was still waiting full consideration. However, the enquirer judged that the information provided was sufficient for his purposes; it arrived very quickly; and it "Would have been an arduous task for me to 'phone around the authorities - it would have been very difficult".

The enquirer said that he would have liked to have received more detailed information as well as that which EMIE provided.

The current position was that the education officer in charge of sites and buildings had put together a list of requirements he would like to see on the property database. The matter was still pending.

INTERVIEW 3

The enquiry concerned disruptive pupils.

There had been a number of working parties with the teacher associations concerned about assaults in schools. A policy document had been agreed and it was then decided to widen the discussion into the area of disruptive behaviour generally. One meeting had been held and it was agreed that the LEA would draft proposals as to how schools and teachers might cope. The proposals were to be presented at a meeting by the end of September.

The enquirer had spoken with a fellow officer about contacting other authorities and it was suggested to him that he should approach EMIE. This was reinforced for him when he attended an SEO meeting at Colchester where he heard EMIE team members talk about the services on offer. He had used the service before, about a week previously, when he had requested information on curriculum-based staffing.

In this current instance he had used the education department's own library,which produced their own county council documents on behavioural problems, NUT publications, NFER behaviour checklist, Schools Council and ACE documents, as well as EMIE. The Schools Council documents on disruptive pupils were most useful in this case.

He had not examined all of the information supplied by EMIE but the documents appeared very useful. The enquirer felt that they would give him a wider context as "I think authorities on the whole take an insular view that there's not much existing outside their own county boundaries and I think this helps us to put it in a wider context, which is quite important". The information provided was appropriate because he really wanted general information on the topic.

Asked if the information had arrived in time the enquirer replied "Oh, yes. That to me is one of the greatest benefits of EMIE, it's so quick. It took a week, I think".

The enquirer said he "wouldn't have sought out quite so much information (if EMIE had not existed). I'd have probably contacted one or two authorities we've got contacts with already and if they hadn't got anything we'd have probably struggled through - (it) would have taken considerable time and caused great inconvenience to other authorities, I'd have thought, as everybody's under pressure and this would have been very difficult to turn out".

He was at too early a stage at the moment to know whether any other information would be useful but "As I was looking for background information I've probably got enough at present".

His paper was still in the course of preparation but he particularly appreciated being able to learn about the format of such documents and also the research that has been done in this area. The enquirer felt that this would save his authority from having to enter into similar research themselves.

A paper was being prepared for the beginning of the term which would seek to put behavioural problems and disruptive pupils into some context.

INTERVIEW 4

The enquiry was on school discipline.

The enquirer had been asked by the Chief Adviser to prepare, for the Chairman of the Education Committee, a list of sanctions that could be applied by school staff because the LEA had abolished the use of corporal punishment. The Headmaster of a comprehensive school had used sanctions which the Education Committee had thought inappropriate.

The enquirer was recommended to EMIE by two of her colleagues. She had not used EMIE before but her colleagues had. As well as contacting EMIE, the enquirer had approached the AMMA, NUT and STOPP.

The AMMA had supplied their 'After Strasbourg' document and the NUT had sent a "bundle of material".

The enquirer felt that the material received from EMIE was much more informative. She had been able to use it to make a selection of LEA material, provide quotations and prepare her own suggestions for sanctions based on one of the documents.

The material provided by EMIE had been in an appropriate form and "very easy to use". It had arrived within four days of her request. She had set a deadline of 13 July and the material had arrived on 7 July.

If EMIE had not existed the enquirer said that she would have had to seek out the information and this, she felt, "would have taken ages". (The NUT had given her a list of authorities with the implication that she could contact them).

The material EMIE provided was said to be "sufficient for my needs" and the enquirer "couldn't praise your help highly enough". There had been no need to come back to EMIE "other than to say thank you very much".

She had written her report stating which services she had used, (including EMIE) which authorities were being quoted, and using information gathered from local schools. The report went to the Chief Adviser who then took it to the Chairman of the Education Committee. It was to be discussed at the September meeting of the disciplinary section of the Education Committee.

INTERVIEW 5

The enquiry concerned special education and the Education Act 1981.

The enquirer had been asked to prepare an information booklet for parents on the Education Act 1981. He had thought that other LEA administrators might have done similar work in this area and that EMIE might be able to save him effort by providing information. He had been the EMIE link person in the authority and as a result "It's just the natural thing to do. If I've got a new project I've got to do some work on, the first thought I have is that I should contact EMIE to see if anybody else has been working on it".

The enquirer had used EMIE previously on several occasions. He had not contacted any other agencies or individuals on this occasion.

The material provided by EMIE was in an appropriate form "In that they were examples of the sort of thing I wanted to do" and the response was "Very prompt". He added that "The EMIE stuff that I got is going to form a very significant part of the final document I'm producing".

Asked if he would have sought out the material if EMIE had not existed, the enquirer said "It's very unlikely. It's unlikely that

I would have written round to lots of different authorities and asked them to send me all they'd done. The fact that EMIE is there, and you can get a vast amount of information through one contact, makes life so much easier".

He would not have liked to have received any other information in relation to this enquiry because "I was sent what I wanted".

The enquirer said that he was producing an information booklet and that he had "'pinched' bits and pieces from various documents received in order to develop my own document ... Some of the documents I haven't used very much, others I've used quite substantially".

INTERVIEW 6

The enquiry concerned outdoor education.

When this Welsh authority was founded ten years ago it had been decided to set up outdoor education centres in the county for their pupils and two were established. A working party decided to look at outdoor education provision in association with other curriculum developments such as rural enterprise and TVEI.

The working party had reached the stage where people were quoting the example of other authorities. They had thought of using EMIE as a way of "avoiding us having to write to everybody or contact a wide range". They had hoped that EMIE would know those who were most active and would possess current information. The enquirer had made use of EMIE previously.

The PE Adviser and teacher members of the working party had made some contacts on a personal basis but had not obtained any documentation. The enquirer, as chairman of the working party, had undertaken to contact EMIE.

The material supplied by EMIE was appropriate. The information had been passed on to the PE Adviser who intended to look at the documentation in detail prior to drafting a paper.

The information had been provided in an appropriate form and the response was "very prompt". The enquirer added that "What impressed me was that it wasn't just left there but trouble was taken to find out more for us".

If EMIE had not existed, the enquirer said they would have thought about seeking out the information. They might have written to a few authorities whose names had been mentioned in their discussions and might also have written to all the Welsh LEAs. "What I hope is that EMIE will (come to) know which of the authorities have the most up-to-date information".

They had received all the information they needed in relation to this enquiry. The material was still being studied before drafting and the enquirer would judge when to submit the paper to Committee.

INTERVIEW 7

The enquiry concerned manuals for caretakers.

The authority was doing a review of their school caretaking and cleaning service. The need had been recognised for a training programme and a manual of operations. They had felt it would be useful to establish what was available from other authorities before they started their own review as "It's always far better if you can poach somebody else's ideas; it speeds the whole process up".

Asked why he had contacted EMIE, he said "It was serendipity in a way". The enquirer was responsible for servicing the senior officers' management group which had been discussing EMIE, the services it offered and the designation of a link person. When thinking of a search for information on this issue it had occurred to him that EMIE might be able to assist. He had not used the service previously.

Apart from EMIE, the enquirer had contacted the County Architect's Department and had also obtained (he wasn't sure how) a copy of a document produced by one of the Scottish authorities.

Both the information which the enquirer had discovered for himself and the material that EMIE forwarded were useful in the negative sense of confirming that there was nothing available which quite met their requirements.

The information provided by EMIE was in an appropriate form. "It gave me exactly what I wanted, contact people and the authorities they were in". The contacts were followed up and it was established that what they had was not really appropriate.

The information from EMIE arrived in time and if EMIE had not existed they would have sought it out but "I'm not quite sure how we'd have gone about it". They had considered sending a circular to other authorities seeking information. "The problem is that you tend to depend on word of mouth ... which really isn't very satisfactory. You ask people if they've heard of anyone who has information and they say 'no'. We'd have probably looked in other ways. Whether we'd have been systematic, I'm not sure".

The respondent said that it would have been useful if we had been able to say that what was supplied was all that there was on the subject - if we could have been sure that we had a comprehensive knowledge of all that was available. There was uncertainty as to whether a document might exist which could have provided the requisite information.

He had used the information in the negative sense that he had not had to spend time contacting other authorities.

The authority was proceeding with the production of their own document for a December deadline.

INTERVIEW 8

The enquiry concerned the application of computers in administration.

It was related to wider interest in the development of computerisation in the authority and especially to the computerisation of financial and personnel records. An enquiry had come from the Deputy Director about the possibility of introducing micro-computers or terminals to the mainframe in the education department. There had been an opportunity to capitalise on some funds available to all departments if quick progress was made in the submission.

It had been hoped that they would learn from other authorities by discovering if there were any in similar or more advanced situations, and avoid the pitfalls. It had been felt that contact with EMIE would be "more efficient than ringing around neighbouring boroughs." The approach had been stimulated by "the very informative open day I attended at EMIE. There was discussion among people attending about computerisation and in particular about employment of micro-systems within education departments. It seemed, therefore, that EMIE was a useful place to start".

The enquirer had previously used EMIE "reasonably extensively". On this occasion, as well as contacting EMIE he had made fairly wide use of the computer services department within the authority and had also had contact with IBM. The Council's own computer department had been most useful because they possessed a degree of technical expertise not available in the education department. They had advised about tasks amenable to computerisation and the equipment that was available.

The information provided by EMIE was "of a great deal of use". They had contacted key individuals in other authorities, notably the ILEA and Bexley, and had followed up this contact by visits to both of these authorities. Other leads had been provided by EMIE which they hoped to follow up in due course.

This information had been provided by EMIE in an appropriate form ("Very much so"), and in time. One response was received within 48 hours of the initial enquiry, and within five days he had received an extensive list of contacts by telephone. "That was exactly what I'd asked for".

Had EMIE not existed, the enquirer would have had to have sought out the information himself but it would have been far more difficult and far more time-consuming.

Asked whether he would have liked to receive any other information, the enquirer replied "No, I got specifically what I asked for". He felt that with hindsight there were other things that he should have sought but it was not EMIE's fault that other information was not forthcoming. He would have liked to have known whether there was a report on the introduction of a specific computer application in a particular area (for example, pupil projections). Any such report might have been of great use.

He had made use of the information "To the extent that I have contacted the individuals named or some of them". They had also found it useful to have been provided by EMIE with a list of authorities employing different computer systems.

They were progressing with the acquisition of computer equipment and were using the information to justify its acquisition. The matter was proceeding through various Council Committees.

INTERVIEW 9

The enquiry concerned small primary schools.

The LEA had a group of six small primary schools with 25 pupils or fewer, which were operating a self-help scheme. The Education Committee had considered their future three years before and decided that they could continue on a self-help basis and with a staffing of 1½ teachers per school. There was to be a review after three and five years and the enquirer was preparing the three year review of the scheme. He was well acquainted with the service EMIE offered and said that his authority were also "Well aware. When we've got some research or something to do, EMIE is the first step". He had made previous use of EMIE. In this instance, the enquirer had not approached other organisations or individuals.

The general background papers provided by EMIE had helped in the report writing stage and "lots of the information you sent me was useful". As well as preparing his review paper he had also been using the material for a comparison between the quality of education in small and larger schools.

The information was provided in an appropriate form and arrived in time. If EMIE had not existed "I would probably have rung colleagues in some other authorities". As well as the information supplied, he would have appreciated more documentation on self-help in schools, which he had also sought.

A report was being written to go in to the September/October committee cycle.

INTERVIEW 10

The enquiry concerned local financial management.

There had been three reasons for pursuing the enquiry: financial devolution to schools was being considered as a means of improving and streamlining decision-making; general consideration was being given to a system of devolving Council powers to area management;

and the enquirer wanted to employ the material for a polytechnic course project.

The enquirer had been aware of the EMIE service since its inception and knew that material was available on this topic area. He had made previous use of the service.

In this instance he had made a "half-hearted" attempt to obtain information from other sources, with telephone calls to Middlesbrough and Newcastle, but he had not obtained much.

The information provided by EMIE was useful ("Very much so"), was provided in good time and was in an appropriate form. "One piece I found especially useful was an overview by John Hudson (EMIE Consultant) which was very useful, very concise".

If EMIE had not existed, the enquirer thought that he would have had to seek out the information but "Time's a problem, as ever. Possibly my efforts wouldn't have brought me the information which I got very easily from EMIE".

In addition to the information provided "I would have liked to see the extent to which financial devolution is being practised across all the authorities. What I've picked up has been a snapshot from various areas of the country. I would have been interested to know the state of play in all authorities".

After obtaining the information he had sent out a questionnaire to all the upper school headteachers. Most were interested in proceeding on a trial basis. He was consulting in his department too, prior to approaching his Council members.

INTERVIEW 11

The enquiry concerned staff development policies and self evaluation.

This enquiry arose from a school which had contacted the enquirer wishing to develop a staff appraisal/self evaluation procedure. He had also wished to look at the issue from the authority's point of view and to have a pilot school for this purpose. The enquirer, who was a recent appointee in the new role of Secondary Adviser, contacted EMIE to get some models to look at and for the school to try out.

He said that the enquiry had also to be seen in the context of other matters. In his new role, he had been given the oversight of self evaluation in schools. He was drafting the authority's curriculum statement for the Secretary of State which included mention of developing a self evaluation procedure.

He had had an initial productive contact with EMIE over curriculum statements and was aware of how much easier his task had been made through EMIE help. He had obtained what he wanted very quickly, on that occasion, as well as a lot of additional help from EMIE by telephone. He had been very impressed by this initial contact and had used the service on about three other occasions.

No other contacts had been made on the staff development policy case. The information received from EMIE had been useful "Without a doubt" and was provided in an appropriate form "In the sense both that it was what I asked for and in a form which led on to other things". It had arrived very quickly.

If EMIE had not existed, the enquirer would have had to have sought out the information, "But it would have taken me a great deal longer. I would have had to go to my opposite numbers in sundry and various authorities and I would not have known what authorities to go for".

Asked whether he would have liked to have received any further information in this case he said it was "Hard to know ... I was quite happy with what I got".

The information had been passed to the school and the enquirer discussed various models with the Headteacher. Next term they intended to pursue a particular policy based on an amalgam of several appraisal policies.

INTERVIEW 12

The enquiry concerned IBM-based pupil record systems.

The enquirer said that it was beyond her scope, with her limited experience of systems analysis and programming and with the facilities that were available to her, to design a satisfactory pupil record handling system. Therefore, she had decided to find out whether there was any software in existence which might assist her task or whether she could make use of the experience of other authorities (e.g. about the sort of data fields they could handle, how they were collecting data, and for what sort of purposes it was being used). She had wanted to contact any other authorities which used an IBM mainframe and had in existence a central pupil record handling system to find out what sort of operating system was used, what language the program employed and generally to pursue her enquiry.

She knew that EMIE staff had results from the survey on the administrative use of computers and were in contact with a large number of authorities who had participated in the survey (as had their own LEA). She had used the EMIE service once before - an enquiry concerning the school use of micro-computers for administrative purposes.

In the case of her enquiry about school use of micro-computers, she felt that the information had been of use. In respect of the enquiry about IBM-based pupil record systems, she felt that the EMIE survey had become out-of-date as things were developing so fast in this area. On both occasions she was looking for contacts and EMIE provided names which were of assistance and summaries of the information available. The information arrived "in about ten days, at most, and may have even been faster than that".

The enquirer would possibly have sought out this information if the EMIE service had not existed. The authority had taken part in a LAMSAC survey and she might have contacted them, but she did not think that they would have had up-to-date information.

If she had felt that any other information was required, the enquirer would have asked EMIE again.

The enquirer said that she made use of the information by pursuing the Coventry LEA contact. The information gained was for her own research use. It was a long-term project as far as she was concerned. (Referring to her other enquiry on micro-computers, she said that the information received had been very interesting and informative and a report had been written using it.) She was a little disappointed that the reply did not fit what she was looking for but was fully aware that this would have been difficult in this fast-changing area.

INTERVIEW 13

The enquiry concerned pupil participation.

The authority was setting up new governing bodies and wished to examine the question of pupil participation. The officers were asked to produce a report.

The enquirer had seen EMIE material in the past and contacted the service as part of his general search for sources of assistance. He had not used the EMIE enquiry service before. He intended to make contact with schools in his authority, the AMMA and NUT.

The matter was pending and the enquirer had not had the opportunity to examine the material in any detail but he thought it was quite satisfactory in form. The information arrived in what would have been sufficient time but the issue was then set to one side within the authority.

The enquirer felt that he would probably have had to search out this information himself without EMIE and that this would obviously have been at some expense of time.

When he returned to the issue he anticipated that he might wish to receive more information. Meanwhile the matter was still pending resolution.

INTERVIEW 14

The enquiry concerned travel passes.

The authority had been asked by coach operators in the county about the necessity of putting photographs on the free bus passes used by pupils of the county. This was a matter which had been in hand for the last two to three years.

The enquirer had attended a meeting in Trafford where he had heard of EMIE. He had been impressed and thought it could be of great use to him. Also, he had inherited a file which contained documentation from EMIE. He had not made previous use of the service and had not contacted any other agencies or individuals in this case.

He had just received a collection of material from an authority which EMIE had advised him to contact. He felt that this would prove valuable. The information supplied by EMIE was in an appropriate form and arrived in time (no particular time deadline was involved).

If EMIE had not existed he would have had to have tried to obtain the information through the contacts he had with other authorities. He didn't know of any other information needed in relation to this enquiry.

The enquirer intended to use the example of the other authority in preparing his case on this matter.

EMIE

EDUCATION MANAGEMENT INFORMATION EXCHANGE
The Mere, Upton Park, Slough, Berks, SL1 2DQ

Telephone 0753 23156
Project Head: David Streatfield
Principal Adviser: George Cooke

Our Ref *Your Ref* *Date*

Dear

We should like to carry out an evaluation of the EMIE enquiry service, using case studies of recent enquiries from a small sample of LEAs, and I am writing to ask whether you would be willing to assist us in this.

The evaluation will be based on short telephone interviews, seeking information, for example, about the background to enquiries, the relevance of EMIE's response, and the use made of any information provided. The results will contribute to the final report of the EMIE Project which we submit to our funding bodies this year, and will also help us to ensure that EMIE provides a useful service. A number of LEAs have already assisted us with previous evaluation exercises. We are most grateful for this past help and regret that we may be approaching some authorities more than once.

My colleague, Mr. Jeff Griffiths, will telephone you during the week beginning 30th July to confirm whether you are willing to participate in this evaluation, and if so, to agree a suitable time for a telephone interview. This should not last longer than 20 minutes at most. The interview would focus on the following enquiry which you submitted to EMIE.

I very much hope that you will agree to cooperate in this part of the EMIE evaluation.

Yours sincerely,

David Streatfield
Project Head

TELEPHONE INTERVIEW SCHEDULE

1 (Outline the enquiry which forms the focus for this interview)

2 Can you tell me something about the context in which this enquiry occurred?

2.1 Was there any special reason that led you to look for the information at that time?

3 Why did you decide to contact EMIE?

3.1 Had you used the EMIE enquiry service before?

☐ NO YES ☐

4 Did you contact any other agencies or individuals outside your own department to get information in this case?

☐ No Yes ☐

4.1 Which ones did you contact?

(Prompt: Any other agencies or individuals?)

4.2 Which contacts were most useful in this case?

(Prompt: Why was this?)

5 Was the information which you received from EMIE of any use?

(Prompt: Did it add to your knowledge, confirm what you know, save you time?)

5.1 Was the information provided in an appropriate form?

5.2 *(If not covered)* Did the information from EMIE arrive in time to be useful?

5.3 If the EMIE service did not exist, would you have sought out this information yourself?

(Prompt: How long do you think this would have taken?)

6 Would you have liked to receive any other information in relation to this enquiry?

(Prompt: What information?)

7 Have you made use of the information received from EMIE in this case?

(Prompt: How have you used this information? Have you pursued any contacts which you were given by EMIE in relation to this enquiry?)

8 *(If not covered)* What is the outcome, or current position, in this case?

9 I'd now like to ask a few general questions about EMIE. How did you first find out about the EMIE service?

9.1 *(If not covered)* Has the EMIE link-person in your Authority drawn attention to the service?

(Probe: How?)

10 Do you see EMIE education management abstracts? The most recent issue was published in July this year.

☐ No Yes ☐

↓

10.1 Have you obtained any of the documents described in EMIE abstracts?

(Probe for extent of use)

11 Have you had any other contact with EMIE?

(Prompt: For example, EMIE open days or information workshops?)

12 Have you any comments about the EMIE service in general or about your contact with EMIE? For example, can you suggest any ways of improving the service?

13 Do you think the EMIE service should continue after March 1985?

14 Finally, what is your current job title please?

14.1 How long have you worked [in LEA education administration/as an LEA adviser]?

(Thank respondent)

APPENDIX G

EDUCATION MANAGEMENT INFORMATION EXCHANGE

LEA INDEPENDENT EVALUATION OF EMIE

DEBORAH GREIG

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Appendix I

Independent Evaluation

The Education Management Information Exchange project was approved by the Department of Education and Science for four years from 1 January 1981. Decisions will soon have to be reached about the future of the service: whether it is to continue, and if so, what changes, if any, should be made. This independent evaluation was carried out to determine the views of local education authorities on the future of EMIE, and to assess their reactions to the service so far.

Margaret Sproat in the role of consultant to EMIE drew up a list of questions which were distributed to a representative number of local education authorities. The questions sought a broad range of views on such matters as the continuation of EMIE; the role and function of the 'link person'; the current use of the different services provided by EMIE; and future developments, such as the location of EMIE and funding. (See appendix 1).

Twenty-three local education authorities were asked for their views: 13 counties, five metropolitan districts, four London boroughs and the Inner London Education Authority. The questionnaires were sent out in February 1984. All responses were received by the first week in April and passed to an independent editor for collation.

The twenty-three local education authorities who took part in this independent evaluation are listed below.

COUNTIES

Buckinghamshire
Cumbria
Derbyshire
East Sussex
Gloucestershire
Gwynedd
Kent
Lancashire
Leicestershire
Powys
Suffolk
West Glamorgan
Wiltshire

METROPOLITAN DISTRICTS

Bradford
Manchester
Sheffield
Wakefield
Wolverhampton

LONDON BOROUGHS

Barnet
Harrow
Havering
Richmond-upon-Thames
Inner London Education Authority

CONTINUATION OF EMIE

	Support/Strong Support	Support/Plan to Increase Usage	Minimal Support
Counties			
1. Buckinghamshire	x		
2. Cumbria			x
3. Derbyshire	x		
4. East Sussex	x		
5. Gloucestershire	x		
6. Gwynedd	x		
7. Kent	x		
8. Lancashire	x		
9. Leicestershire	x		
10. Powys	x		
11. Suffolk	x		
12. West Glamorgan	x		
13. Wiltshire	x		
Metropolitan Districts			
14. Bradford		x	
15. Manchester		x	
16. Sheffield	x		
17. Wakefield	x		
18. Wolverhampton	x		
London Boroughs			
19. Barnet		x	
20. Harrow	x		
21. Havering	x		
22. Richmond-upon-Thames	x		
23. Inner London	x		
	19 LEAs	3 LEAs	1 LEA

The overwhelming majority of LEAs are anxious for EMIE to continue, and many express the hope that its services will be extended in future. EMIE is described as 'excellent', 'extremely efficient', 'invaluable', and 'very successful'. These epithets occur frequently in the LEAs' replies.

Twenty-two authorities pledge their support for the service and believe it is fulfilling a need. The consensus is that EMIE has established itself as a much-needed service in a relatively short space of time. Only one LEA - County Authority - suggests that EMIE might not be missed. But this Authority does concede that some of its officers have used the service 'with satisfactory results'.

The following comments are typical of the replies received, and give a flavour of the LEAs' reaction to EMIE. Wiltshire stresses that EMIE should continue: 'We find the service very useful and remarkably efficient. A 'phone call is usually enough to get an idea of what information is available on a topic, and hard copy is soon sent as a follow up'.

Remarking on the high quality of the service, Wakefield says it is 'quick, accurate and friendly'. Richmond-upon-Thames says EMIE is 'efficient and effective' in its operation: 'The service fulfils a need which can otherwise only be met by many hours of duplicated work by LEA officers'. The 'promptness and efficiency' of the service are singled out for comment by the Inner London Education Authority.

Saving of Time and Effort

Many of the comments suggest that LEAs value EMIE because it saves them considerable time and effort - and the duplication of effort. Gwynedd says it is a very useful provider of comparative information on LEA policy when policies are being reviewed and new strategies developed: 'It does reduce considerably the time involved in seeking out relevant sources and requesting the required information in specific subject areas'.

The point is echoed by West Glamorgan which reports receiving helpful and relevant information from EMIE which helped shape the Authority's policy on the use of computers at Central Office and in links with schools and colleges. 'It was most important to learn from other LEAs what experiences had been in this most sensitive and fast-changing field', says West Glamorgan. 'EMIE was of very great assistance in providing background documents and contacts in other Authorities.' Another Welsh Authority - Powys - praises EMIE because it cuts out duplication of effort and 'costly questionnaire approaches by individual LEAs to other LEAs'.

Contacts

EMIE's role in promoting contacts between LEAs is often mentioned in the replies. Richmond-upon-Thames notes that EMIE has proved a useful source of named individuals in other Authorities who are concerned with similar issues. Sheffield, too, welcomes closer contacts with other Authorities. 'We keep re-inventing the wheel as LEA officers', says a Sheffield respondent. 'Colleagues elsewhere are ahead of us.'

Many LEAs welcome the contacts they have had with EMIE staff. Looking ahead, Powys comments: 'As personal contacts develop, so confidence in the service will increase.' Leicestershire is one of many Authorities which pay tribute to EMIE staff: 'The service is excellent. Staff of EMIE are always cooperative, prepared to make an effort, and provide information speedily, often by return of post.' West Glamorgan is 'particularly impressed' by the professionalism of those at Slough.

Support for EMIE is equally strong in county and metropolitan councils. But there are some signs that smaller Authorities feel they may derive special benefit from the pooling of expertise. Wolverhampton, for example, says 'EMIE provides an invaluable service which only the very largest Authorities could hope to emulate. If the costs are shared between all Authorities, we will get good value for money'.

Extended Use

A few respondents indicate that they have made only 'limited' use of EMIE, or have only recently become aware of the full range of services on offer. In each of these cases the Authority is planning to make greater use of the service in future.

Sometimes this more limited usage stems from ignorance of EMIE's activities. A Bradford respondent explains how a recent Open Day gave him insights into EMIE's operation which he was able to publicise more widely within the Authority. Sometimes problems of communication within the Authority may be responsible for restricted use of the service. Link people may have difficulty in making colleagues more aware of what is available. West Glamorgan says that though the broad range of activities is known through the link person, the role of EMIE consultants might be used and publicised more by the link person.

There is certainly evidence that some link people feel their colleagues could make greater use of EMIE. 'It is taking us time to be accustomed to the availability of EMIE', the Deputy Chief Education Officer for Lancashire reports. At Barnet, the EMIE link person is the Authority's Chief Inspector, and Leader of the Authority's Advisory Team. He says it is only in the past

18 months or so that colleagues have begun to be aware of the scope of EMIE services. 'A number of colleagues now obtain copies of the published reports and abstracts, and find them valuable as background information', he says. 'Too few (in my view) tap the other services, although this is increasing. Colleagues do not, as a routine, consider the possibility of help from EMIE in developing new policies - but this is changing.'

LEA Backing

It seems likely that EMIE's services will be far more widely used as LEA officers become more aware of them. The trigger may be an Open Day, or a projected change of policy in an Authority, such as impelled West Glamorgan to seek information about computing services.

From the replies it is clear that EMIE is felt to be giving valuable support to LEAs. How far are LEAs in their turn supporting EMIE? Several respondents acknowledge that the quality of the service depends to some extent on the support it receives from the Authorities. 'There is', says Harrow, 'an obvious need to continue to encourage a greater commitment from all LEAs.'

A similar point is raised by Leicestershire: 'The quality of the service is bound to be as good as the commitment of LEAs to it. Both quality and quantity will develop as awareness of the service grows.' The willingness of LEAs to submit material as it becomes available is crucial to EMIE's operation, Leicestershire adds. 'Ways of encouraging this must continue to exercise the EMIE staff.'

LINK PERSON

		Essential/Needed	Useful but Not Essential	More Direct Links Sought
Counties				
1.	Buckinghamshire	x		x
2.	Cumbria	no comment		
3.	Derbyshire	x		
4.	East Sussex		x	
5.	Gloucestershire	x		
6.	Gwynedd	no comment		
7.	Kent	x		
8.	Lancashire	x		
9.	Leicestershire	x		
10.	Powys		x	x
11.	Suffolk	x		
12.	West Glamorgan	x		
13.	Wiltshire	x		
Metropolitan Districts				
14.	Bradford	x		
15.	Manchester		x	x
16.	Sheffield	x		
17.	Wakefield	x		
18.	Wolverhampton	x		
London Boroughs				
19.	Barnet	x		x
20.	Harrow	x		x
21.	Havering		x	x
22.	Richmond-upon-Thames	x		
23.	Inner London	no comment		
		16 LEAs	4 LEAs	6 LEAs

LINK PEOPLE

Users of EMIE were asked to comment on link people - those acting within Authorities as contacts between LEA officers and EMIE staff at Slough. 'Do you consider the role of link person essential?', the questionnaire asked. Sixteen respondents feel the role is 'essential', 'very helpful', or 'highly desirable'. Four feel it is not essential, but has its uses. And three offer no comment on the link person's role.

Several respondents support the link person concept on grounds of administrative convenience. Using the link person as the main channel of communication between the LEA and EMIE helps avoid duplication, they say. It also means there is someone available locally to act as a reference point.

The link person is viewed as an important contributor to the quality of EMIE. The coordination he/she achieves at local level 'can significantly increase the effectiveness of the scheme', a Sheffield respondent feels. Bradford points out that someone is needed to take responsibility for identifying and sending material to EMIE - 'thereby improving the service it can offer.' Harrow fears the two-way flow of information could become clogged up without a link person: 'If no-one has a specific responsibility, the provision of information may be overlooked.'

Coordinator

The function of the link person as coordinator is valued by most Authorities. 'LEAs are large organisations', Gloucestershire points out. 'There is a need to focus requests for the supply of information.' In Barnet the link person sees himself as 'the face of EMIE in the Education Department'. Several respondents comment on the need to have a single contact available within the LEA, and in a position to advise on the range of EMIE services.

The central task of the link person as coordinator is the business of disseminating information: making sure that papers and documents emanating from EMIE are seen by the right people. East Sussex observes that the LEA-based link person has valuable knowledge of the Authority and of the people who are most likely to benefit from EMIE's services.

Practically every link person who describes his/her function undertakes the job of circulating material from EMIE within their Authorities. Most also feel it is their task to raise colleagues' awareness of EMIE's activities. 'There is a need for publicity within the LEA', says Bradford, 'in order to ensure awareness of EMIE services among officers and advisers...'. The Kent link person comments: 'I try to remind colleagues frequently of EMIE's existence and its ability to help with general enquiries.' In Wolverhampton, where the link person is the Deputy Director of Education, there is a strong feeling that the link person should be a senior officer with an overall perspective of the Authority's work.

Link people report that they attempt to spread the word about EMIE through informal contacts with colleagues and through the more formal channels of departmental meetings or gatherings of senior officers. The Havering link person ensures that the use of EMIE is raised at management team and other meetings.

Winning colleagues' interest is not always easy, says the link person for Wiltshire. But persistence usually bears fruit: 'Once some useful information has been quickly obtained for a particular member of staff, he/she is then converted to the service'.

LEA Material

Less emphasis is apparent in the replies on the link person's role in providing EMIE with material from his/her Authority. This may not, of course, indicate a relative lack of concern for this aspect of the link person's work. But some LEAs clearly feel they need to stress that Authorities should be providing information as well as receiving it. Derbyshire says the link person 'has identified ways in which this Authority has been able to contribute to the information network'. Barnet notes that it is for the link person to identify documents which might be forwarded to EMIE.

From these replies it is evident that Authorities would not wish to see the demise of the link person. But there is some demand for supplementary links with EMIE.

Direct Links

Four LEAs say the link person is not absolutely necessary. Of these, East Sussex and Powys concede that he/she is probably useful, but Powys feels individual LEA officers may prefer direct contact with EMIE staff. Manchester reports that officers have tended to use the service directly instead of going through a link person: 'The role.... would therefore appear to us to be superfluous, apart perhaps from the task of disseminating within the Department information received from EMIE'. Havering also argues for more direct contact. 'There is obvious benefit', it says, 'in the originator of an enquiry or information contribution dealing directly with EMIE'. Barnet feels that, at times, it is a weakness for EMIE to have to depend entirely on a link person for promotion when the link person may be short of time. 'Ways should be sought to develop more direct communication with other officers, if the full capacity of EMIE's resources is to be exploited', Barnet adds.

Future Role

While a handful of respondents feel the link person may have outlived his/her usefulness, it is widely recognised that the link person still has a valuable role to play in promoting the two-way contacts between LEAs and EMIE. The consensus view is summed up in the following comment from the Deputy Chief Education Officer for Lancashire: 'I think it is essential for the link person arrangement to continue for a little longer in order to ensure that there is someone in each Authority taking a particular interest in EMIE and reminding colleagues of both the need to supply material and the availability of EMIE as a source of information'.

USE OF SERVICES

		Enquiry Service	Abstracts Service	Training Events	EMIE Publications
Counties					
1.	Buckinghamshire	x	x	x	
2.	Cumbria	no comment	no comment	no comment	
3.	Derbyshire	x	xx		x
4.	East Sussex	xx	xx	x	x
5.	Gloucestershire	x	x		x
6.	Gwynedd	x	x		
7.	Kent	xx	x		
8.	Lancashire	xx	x		
9.	Leicestershire	x	x		
10.	Powys	xx	x	x	x
11.	Suffolk	x	xx		
12.	West Glamorgan	xx	x		
13.	Wiltshire	x	x	x	x
Metropolitan Districts					
14.	Bradford	x	x		
15.	Manchester		xx		
16.	Sheffield	xx	xx	x	xx
17.	Wakefield	x	x		
18.	Wolverhampton	x	xx	x	xx
London Boroughs					
19.	Barnet	x	xx		
20.	Harrow	x	x	x	
21.	Havering	xx	x		
22.	Richmond-upon-Thames		xx	x	
23.	Inner London	x			
		20 LEAs	21 LEAs	8 LEAs	7 LEAs

x = *Service Useful/Helpful*

xx = *Service Very Valuable*

USE OF EMIE SERVICES

Respondents were asked to comment on the services EMIE provides: the enquiry service, the abstracts service, training events organised by EMIE, and EMIE publications.

It is clear from the replies that LEAs are eminently satisfied with both the enquiry and abstracts services. Many indicate that they find them invaluable, and are most concerned to see them continued. Very similar patterns of use emerge for both these services.

Enquiry Service

As many as 20 of the 22 Authorities which commented on this service expressed satisfaction, mostly of a high degree. Thirteen LEAs find this service useful or helpful. A further seven are particularly impressed with it. Lancashire is 'very impressed', and so is West Glamorgan. Sheffield says the service is 'first-class', and Havering declares it is 'most useful and extensively used'. The other three LEAs giving special plaudits to the enquiry service are East Sussex, Kent and Powys.

The two Authorities which use the enquiry service infrequently or not at all are Manchester and Richmond-upon-Thames. (Cumbria offers no comment on any services.) Both LEAs explain that they make extensive use of the abstracts service. Wiltshire says the enquiry service is 'good', but adds that this depends on who answers the telephone.

The topics mentioned by LEAs indicate the wide range of subject matter on which requests for information have been passed to EMIE staff - and satisfactorily dealt with. Gwynedd report that EMIE officers have been 'very helpful indeed' in responding to enquiries about corporal punishment, the careers service, school transport charges, capitation allowances, and computers in several aspects of administration.

There are several comments about the promptness and efficiency of the enquiry service, and about the professionalism of EMIE staff. It will, doubtless, be gratifying to the EMIE team that LEA administrators who are not renowned for their use of superlatives should wax so eloquent on the quality of the service they receive. Wolverhampton says it has been remarkably rapid and efficient: 'Considering that there is only a small staff at headquarters, they have displayed a remarkable level of knowledge and interest.'

A couple of quotes from a County Authority and a London Borough are typical of the high level of appreciation recorded in this section of replies. West Glamorgan writes: 'We have all been impressed by the speed with which documents have been sent, and the courtesy and professionalism of the officers at Slough...We are very well pleased with the relevance of the information received'. Havering's experience is that EMIE's other services have been helpful, but the response to specific enquiries has been of most value: 'We have made several such enquiries over the last two years, and found the response efficient, rapid and pertinent.'

Abstracts Service

Twenty-one Authorities offer comments on the abstracts service. Twenty-one have favourable things to say. Twelve say it is 'useful', 'helpful', 'efficient'. Nine find this service particularly valuable. They are: Derbyshire, East Sussex, Kent, Suffolk, Manchester, Sheffield, Wolverhampton, Barnet and Richmond-upon-Thames.

Gwynedd has made extensive use of this service: 'During the last six months we have received copies of 44 documents listed in EMIE abstracts, dealing with such topics as 16-19 developments, curriculum review and staffing policy, evaluation and TVEI.' Powys points out that this service keeps the spotlight on EMIE's activities: 'The abstracts service provides a timely reminder of the existence of EMIE and also the possibility of gaining information on the issues of the day'.

The consensus in Suffolk is that this service is very helpful. 'The service is well understood and fairly widely used by us', an Assistant Education Officer reports. One officer does suggest, though, that some reports are a bit out of date. 'Could LEAs be encouraged to forward useful data more quickly?', he asks. This point is taken further by Suffolk's AEO who suspects that after an initial flurry of activity EMIE may find fewer documents are being submitted by LEAs on their own initiative. 'It may', he feels, 'be necessary to resort rather more to requests for material in specific subject areas.' He adds that link people may not always be aware of the full range of material being produced within their Authorities.

Wiltshire likes the way abstracts are grouped under topic headings. Wakefield describes them as 'valuable synopses', though a Sheffield correspondent feels EMIE could sift information more finely and reduce it to bare essentials. One Sheffield officer suggests that EMIE draw together various strands of different topics in order to produce brief documents. Examples he suggests are: 'What is the current situation on the provision of halal meat?'...'On suspension?'...'On profiling?'

Another suggestion from Sheffield is that a quality précis service would be more helpful than what EMIE currently offers. 'I don't have the time', he says, 'to plough through reports produced by other LEAs on specific topics.' This respondent argues that a précis service is needed not only for LEA reports, but for more general matters in education. 'We are bombarded by written information, most of which is repeating what has been said many times over', he complains. 'An intelligent monitoring of the main sources of education information and highlighting of important information would be very useful.'

Training Events

These attract less comment, probably because some LEAs are less familiar with this aspect of EMIE's provision. Sixteen of the 23 LEAs responding volunteer comments on training events, and most of them indicate that these have made less impact than other services. Training events get bouquets from Sheffield ('very useful') and from Harrow which reports: 'One Assistant Controller attended the workshop on Information Technology and described this as "excellent".' Wiltshire is also impressed with training events, and suggests that they 'should be extended by taking them away from Mere Park so that various officers from groups of LEAs can be trained together'. Access to the data base might then prove difficult. But Wiltshire thinks this could be overcome by approaching a friendly LEA with a compatible system. Richmond-upon-Thames finds training events 'relevant', and completes the four LEAs with a high opinion of EMIE's training provision.

Three LEAs - Powys, Wolverhampton and East Sussex - welcome certain aspects of EMIE training. Powys finds the events 'interesting', but thinks it's too early to comment on their usefulness. Wolverhampton offers no comment on training as such, but welcomes the Open Day initiative: 'The recent Open Day was well organised, informative, and showed an impressive range of services available.' (Bradford also welcomes the Open Day.) East Sussex notes that 'training days enable links between LEAs to be developed, and provide a forum for contact and discussion for officers with similar interests/concerns'.

Nine Authorities seem to have had only marginal contact with training events. They are: Derbyshire, Gloucestershire, Kent, Leicestershire, West Glamorgan, Bradford, Manchester, Wakefield and Barnet. They report infrequent or occasional use of EMIE training events, though they generally welcome some training provision.

EMIE Publications

These, like the training events, attract far less comment than the enquiry and abstracts services. Less than half of the 23 LEAs offer thoughts on the publications. Of the nine which do, seven find them useful or very useful. East Sussex singles out for special mention a report on computers in administration. Powys says EMIE papers offer a useful overview. Wiltshire also welcomes the broad perspective they give - 'especially the summaries of LEA responses to particular topics which offer a good glimpse of a national picture'.

Derbyshire, Gloucestershire, Sheffield and Wolverhampton have favourable impressions of EMIE publications. Leicestershire has used a limited number. And Richmond-upon-Thames has found this part of EMIE's provision 'least useful, so far'.

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From this analysis it is clear that the enquiry and abstracts services are the ones which attract most attention, and are the most familiar to LEAs. The comments on training events and publications would suggest more a lack of information and experience of these services than any disenchantment with what they offer.

FUTURE DEVELOPMENTS

In response to queries about the future development of EMIE, the Authorities raise several points which fall under the umbrella headings : location of service; methods of operation, funding, and range of services.

Location of Service

Six Authorities say they are happy with the current EMIE base at Slough. Of these, East Sussex says that if an alternative were needed, a London base would be best. West Glamorgan has no strong views about the location: 'Provided the database is relevant and up-to-date, it could be anywhere.' Being under the wing of NFER is 'particularly helpful', West Glamorgan adds. This point is echoed by another Welsh Authority - Powys - which remarks on the benefits of having access to NFER expertise and existing computers.

No Authority raises any objection to having EMIE based at Slough. But there is a plea from Wakefield for a 'Northern Information Service' to be considered - under the aegis of Slough. Wakefield's Chief Adviser writes: 'We already have substantial contacts with NFER through our north regional information centre at Woolley Hall, near Wakefield'.

Funding

The six LEAs which comment on future funding arrangements raise a variety of options. East Sussex maintains that EMIE's greatest appeal has been its lack of cost to LEAs. 'In times of diminishing resources', it says, 'the future request for any large sum of money to help fund the service would have to be considered very carefully'. These doubts are shared by Wiltshire which regards the question of funding as problematical. 'It is possible that LEAs will take over the funding, as they do with other consortium-type arrangements', says Wiltshire's Senior Secondary Adviser. But he suspects they will need to be 'much more strongly convinced of the usefulness of the service'.

Barnet is more sanguine about the prospects of securing some financial support from LEAs. This may be needed to ensure EMIE's continued existence, Barnet points out. 'In the view of colleagues this would be justified, provided all LEAs accepted the commitment.'

Both Leicestershire and Havering take the view that arrangements might be made for LEAs to share the costs through the Local Authority associations. Powys adds that the DES and Welsh Office should contribute, along with the LA associations, to fund EMIE in future.

Range of Services

Most LEAs are well satisfied with the existing services. Nine offer suggestions for extending EMIE's work. Derbyshire likes the idea - raised at a recent Open Day - of having an LEA research group. Wolverhampton and Barnet would welcome more contacts with EMIE staff, and Wolverhampton suggests that they should attend the regular regional meetings of the Society of Education Officers. Barnet favours more personal contact between their education staff and the staff at EMIE. Kent wants EMIE to compile lists of contacts who can advise on certain subjects.

There is some demand for EMIE to produce more condensed reports which would save LEA officers more time. Richmond-upon-Thames and Sheffield feel this would be helpful. Suffolk and Barnet wonder if EMIE might embark on surveys. 'As well as asking LEAs for details of particular initiatives, could EMIE carry out surveys of how LEAs are responding to certain common problems, eg the need to remove surplus places', Suffolk asks. 'Brief details only, plus the name of a contact, would be required from each LEA and held in EMIE databases.'

Barnet enters a plea for a study of the support needs of advisers and inspectors. This aspect of EMIE's provision could be strengthened, Barnet argues.

Powys feels EMIE should consider broadening its focus in future, and think about extending into the curricular side of education officers' work. The Authority notes that a pilot scheme of this kind was suggested at a recent meeting in Cardiff: a study of the provision of special education through the medium of Welsh.

Methods of Operation

Nine Authorities look forward to some changes in EMIE's working methods. Without exception, these relate to exploiting technology in order to yield more information, more quickly, to more users. Havering wants direct access to the data, and feels this would result in EMIE being used more extensively. Wolverhampton says the link person could benefit from a 'dial-up' facility. And Leicestershire says the use of a 'teletext-style dialling-in system' might be a long-term aim.

The ILEA would welcome direct links to access the STAIRS database directly. Buckinghamshire says 'patching-in' to Slough should go ahead as soon as possible.

West Glamorgan favours a network of telephone lines into which LEAs could link through modems and VDUs at County Hall. An on-line display like this, says West Glamorgan, would make it easier to sift documents and find the small number most relevant to the enquiry in hand. 'It would also make the distribution of the abstracts bulletins simpler, and perhaps permit more frequent release.'

Two Authorities - Wiltshire and Harrow - would welcome extensions to the database. Wiltshire wonders whether EMIE could store different information, including items from the Assessment of

Performance Unit question banks. Harrow specifies information culled from the NFER's research findings.

The following comment from the Chief Inspector at Barnet sums up ideas expressed by several respondents. 'The sharing of experience and information is increasingly important and a source of time saving. It seems very necessary to find some way of establishing EMIE more permanently, particularly in the light of the ever improving technological facilities now available.'

CONCLUSION

From the evidence of this independent enquiry it is quite clear that Local Education Authorities are overwhelmingly in favour of a continuing and expanded role for EMIE in the future. They are impressed with what the staff at Slough have achieved, and many are already coming to view the services as invaluable.

A typical comment is one from Gwynedd's Director of Education who expresses the earnest hope that EMIE can be maintained. 'I am sure its usefulness will be enhanced', he says, 'as EMIE is increasingly accepted as a central agency of educational information management.'

Deborah Greig
(Independent Editor)

April 1984

EMIE *EDUCATION MANAGEMENT INFORMATION EXCHANGE*

Project Head: David Streatfield
Principal Adviser: George Cooke

Dear

LEA INDEPENDENT EVALUATION OF EMIE

As you know, the EMIE project was formally approved by DES for four years from 1st January, 1981. It is necessary for decisions to be taken very soon on the future of the service from 1985 - whether it is to continue, and if so, what changes, if any, should be made. In this connection it is, of course, vital to know the views of LEAs, and accordingly I am writing on behalf of EMIE to ask for your assistance. We apologize for presenting you with more paper work, but we shall be most grateful for your help which, as I am sure you appreciate, is essential for evaluation. It is intended to produce a full report on the opinions of a representative number of LEAs by arranging for an independent editor to collate the information. May I ask you, therefore, to give your views on the following topics?

1) CONTINUATION OF EMIE

First and foremost, do you and your colleagues think that EMIE should continue after 1984? It is appreciated that you may subsequently suggest some alterations, but, in principle, is this service needed? If you consider that it should terminate, it would be most helpful if you would be good enough to tell us your reasons. If you do feel that it should go on, would you let us have your views on the quality of the service and its mode of operating, with special reference to "link persons", use of the service, and future developments.

2) LINK PERSONS

Do you consider the role of link person essential? How have you used the service, in what ways have you been able to draw it to the attention of colleagues; are there ways in which EMIE officers/consultants could help more?

Sponsored by the Department of Education and Science, the National Foundation for Educational Research in England and Wales, and the Society of Education Officers

3) USE OF THE SERVICE

What do you and your colleagues think of: the enquiry service; the abstracts service; training events organised by EMIE; EMIE publications; any other aspects of the service?

4) FUTURE DEVELOPMENTS

Have you any views on future developments - location of service; methods of operation; range of services; funding?

5) ANY OTHER COMMENTS

Obviously you will wish to discuss these items with colleagues: if they send you written replies, would you be good enough to collect these and send them together, rather than arrange for individual comments to come separately. The length of the reply is of course, a matter for you, but it would be most helpful for subsequent editing if you would follow the headings in this letter. The sources of replies will be treated as confidential unless you specifically say otherwise.

Finally, may I ask you to return the attached slip, by 17 February, indicating whether you are prepared to help with this evaluation, since we must ensure that we have sufficient replies to assist in decisions about the future of EMIE. If you will take part, please send your replies to me at the address shown above, not later than 14 March 1984. If you need further clarification, or would like to discuss the matter, please do not hesitate to contact me by letter or phone.

A copy of this letter is enclosed and I should be grateful if you would bring this to the attention of your Chief Education Officer.

With all good wishes.

Yours sincerely,

Margaret A. Sproat

Consultant to EMIE

APPENDIX H

SOCIETY OF EDUCATION OFFICERS

5 Bentinck Street
London
W1M 5RN

President D Fisher MA
General Secretary
Administrative Officer Roy P Harding CBE BSc FIMA DPA

Telephone: 01-487 4992

17th November 1984

Dear David,

I promised you a view of EMIE from the point of view of the Society as a contribution to the report to the DES.

The Society started by welcoming EMIE as an experiment though the potential real value was uncertain for some time. Wide consultation within the Society in the last few months has shown that there is now a clear acceptance of the great value of the service that has been developing in what, for a good information service, is a relatively short time.

The EMIE project has been fortunate in the staff it has had - full-time and part-time at the NFER, the principal adviser and consultants. The SEO believes that it has been demonstrated, beyond reasonable doubt, that EMIE enables local authority officers in a more effective, and cost effective, way to obtain useful information which enhances the value and reliability of policy proposals and, consequently, contributes greatly to the ways in which they are able to help their authorities to maintain, and if possible improve, educational standards.

Yours sincerely

Roy

EMIE EDUCATION MANAGEMENT ABSTRACTS

EMIE EDUCATION MANAGEMENT ABSTRACTS

No. 4 July 1983

The documents described here represent a selection of those received by the EMIE Service. Unless otherwise stated, copies of the documents can be obtained from EMIE by telephoning 0753 23156 or by writing to the EMIE Service, The Mere, Upton Park, Slough, Berkshire SL1 2DQ. All we need is the number in front of the item described and your name and address.

Please note that this publication is intended for use by LEA education officers and advisers only.

COMPUTERS

126 Final report on Rotherham primary schools computer evaluation project

ROTHERHAM Education Department, 7 June 1982.

Report on the introduction of microcomputers into primary classrooms. The Authority's approach, which has generated interest in other LEAs, has been to aim for a controlled, monitored introduction of micros, ensuring that practice matches philosophy. The report looks at schools' experiences, the development of software, and in-service courses. Recommendations include the appointment of a primary computer coordinator, the purchase of programming services, and the establishment of a computer centre.

11 pages.

CURRICULUM

127 Cheshire curriculum statement

CHESHIRE Education Department, August 1982.

Response to DES Circular 6/81 for consideration by the Education Committee. Intended for distribution to schools and Governors, the document draws attention to the curriculum implications of: the Education Act 1981; equal opportunity regulations; living in a multicultural society; and new technology. The need for continuity and coordination in schooling is stressed. There is reference to the self-evaluation work in secondary education, encouraged by the Cheshire Curriculum Reappraisal Group. Approaches to curriculum analysis for schools are suggested and the secondary school curriculum model, accepted by the Education Committee, is included as an appendix.

16 pages plus appendices.

128 A framework for the curriculum of 12-16 schools in Surrey

SURREY Education Department, January 1983.

Part of the Authority's response to DES Circular 6/81. The paper, which provides the LEA's statement of curricular policy, contains the curriculum model adopted by the Authority as a basis for resource planning. As a means of monitoring the curriculum, the Authority has introduced annual returns to be made by secondary schools, giving information on staff deployment and on curricular organisation and pupil opportunity. To assist in school self-evaluation, a document entitled 'School review' will be the subject of a pilot scheme in selected Surrey schools.

15 pages plus appendix.

129 Working party on school curricula

LINCOLNSHIRE Education Department, April 1983.

Consultative report by a working party of elected members, heads and teachers, set up in response to DES Circular 6/81 and other initiatives on the curriculum. Makes recommendations on curriculum protection, staffing levels and in-service training in primary education. Considers curricular aims in secondary schools, suggests a model for curriculum-based staffing in different types and sizes of school, and discusses methods of liaison between schools. Recommends county curriculum development groups for both primary and secondary schools.

39 pages.

EDUCATIONAL DISADVANTAGE

130 Educational priority index

DONCASTER Education Department, 8 March 1983.

Reviews the analyses available to the Authority for assessing social deprivation and educational need. Takes the view that the free school meals factor can be used as the main indicator of socio-economic deprivation/financial need, for the purpose of general assessment of schools in need. To correlate social needs and educational underachievement, an analysis of need for assistance from the Teaching Support Service has been carried out, based on the results of the 7+ screening programme. Proposes that there should be a second screening process prior to secondary transfer. Appendices include a report (February 1983) on positive discrimination in education services in Doncaster.

4 pages plus appendices.

FALLING ROLLS AND THE MANAGEMENT OF CONTRACTION

131 The provision of primary school places within the Borough

London Borough of KINGSTON UPON THAMES Education Department, March 1983.

Consultative paper setting out area roll projections and the implications for reduction in teaching accommodation. Rather than school closure, the paper recommends the removal of surplus classrooms from use, to achieve a reduction of 560 places and a saving in running costs of £9,600 p.a. Also considers problems for school management systems resulting from falling rolls and variations in demand for places, and suggests 'pairing' infant and junior schools to improve organisational flexibility and cost effectiveness.

25 pages.

132 Review of primary schools in the North East of Coventry

COVENTRY Education Department, 14 June 1983.

Part of a continuing assessment of accommodation in the light of changing pupil numbers, this examination of primary schools has been based not simply on falling rolls and individual school accommodation but also on a consideration of social factors and resulting educational needs in the area.

9 pages plus appendices.

133 Teacher mobility

ROTHERHAM Education Department, 1982.

Proposal, approved by Council, for a pilot scheme to increase teacher mobility in primary schools and thus help to combat problems arising from lack of opportunity for movement and promotion. The scheme allows 'sideways' moves from one school to another on a voluntary basis with an opportunity to return to the 'home' school after one year. The aim is to develop individual teachers and at the same time to respond to the curricular needs of schools.

5 pages.

LOWER ATTAINING PUPIL PROJECTS

In addition to projects in Coventry, Northamptonshire and Wiltshire, listed in the March 1983 edition of Education Management Abstracts, EMIE can now provide details of DES-approved schemes in the following LEAs (or a more detailed abstract if required):

134 BRADFORD (proposal for a 'skills foundation course', with pupils spending three days per week at school and two at a community centre.)

LOWER ATTAINING PUPIL PROJECTS continued

135 **GATESHEAD** (proposal for a course comprising six parallel components: common-core modules, study-support skills workshop, work experience, tutor groups, group project activities, arts/recreation/leisure.)

136 **INNER LONDON EDUCATION AUTHORITY** (proposal for a one-year bridging course, involving elements of school and college-based work, work experience and residential experience.)

137 **LINCOLNSHIRE** (proposal for a two-year course covering a range of vocational themes, and provided at two comprehensive schools linked with the College of Technology and the College of Agriculture and Horticulture.)

138 **NOTTINGHAMSHIRE** (proposal for course consisting of 'core modules', e.g. communication skills, commercial and economic skills, developing work habits; 'complementary modules', e.g. control technology, trade and travel, design, leisure pursuits; and 'option modules'.)

139 **SANDWELL** (proposal for extra staff to work with three schools - one 11-18, two 11-16 - developing courses, assisting with teaching, running in-service courses and producing materials.)

MULTICULTURAL EDUCATION

140 Multi-cultural education. Report of the Director of Education

WOLVERHAMPTON Education Department, February 1983.

Report and statement of a Council policy for multi-cultural education. Describes the work of the Multi-Cultural Education Service in Wolverhampton, including the TESL support team, intensive language teaching for 11+ pupils at a Language Centre, two 'mini centres' for junior age children, in-service training for teachers, production of teaching materials, adult tuition, and home tuition. Recent initiatives in primary and secondary education are outlined. Appendices include discussion group reports from a Multi-Cultural Seminar held in September 1982.

19 pages plus appendices.

NEW TECHNICAL AND VOCATIONAL EDUCATION INITIATIVE

EMIE can provide copies of MSC-approved NTVEI submissions from the following LEAs (or a more detailed abstract if required):

141 **BARNSLEY** (the proposed scheme will be based in five 11-19 schools, three 11-16 schools, the sixth form college, college of technology and college of art and design.)

142 **BIRMINGHAM** (proposal for a scheme to be based in 11-16 schools, 11/12-19 schools, FE and sixth form colleges, and adult, youth and community services.)

143 **BRADFORD** (the proposed scheme will be aimed at an area of social and educational disadvantage and will be based on an existing, successful 16-19 consortium operation involving two 13-18 comprehensives and a large FE college.)

144 **HEREFORD AND WORCESTER** (proposal for a scheme involving ten rural schools - seven 11-16, three 11-18 - together with a technical college and a college of agriculture.)

145 **HERTFORDSHIRE** (proposal for a scheme to be based on three existing 16-19 consortium arrangements, covering ten schools, with a college of FE.)

146 **LEICESTERSHIRE** (the proposed scheme consists of a federation of individual projects - in schools, community colleges, colleges of FE and a sixth form college - supported by a County programme.)

NEW TECHNICAL AND VOCATIONAL EDUCATION INITIATIVE continued

147 SANDWELL (proposal for a scheme to run in 11-16 and 11-18 schools, with links between schools and colleges.)

148 STAFFORDSHIRE (proposal for a modular scheme to be based in five high schools, two FE colleges and the sixth form college.)

149 WIGAN (proposal for a scheme to be based in a tertiary college, six 11-16 schools and two 11-18 schools.)

- - - -

150 MID GLAMORGAN (this scheme was not approved for MSC funding, but was highly commended and the Authority is proceeding with implementation using its own resources.)

PUPIL PROFILES

151 Report of the Working Party on pupil profiles

SANDWELL Education Department, April 1983.

Provides guidelines on pupil profiles, setting out briefly the aims and curriculum implications of a profiling system. The 'Sandwell Statement of Success', a system proposed as the basis for a pilot scheme in schools in 83/84, is attached. This has three sections for pupils to complete, dealing with school life, out of school interests, and specific strengths and personal qualities. The Working Party was not in favour of including teachers' comments on pupils' personal qualities within a profiling system.

3 pages plus appendices.

SCHOOL MANAGEMENT

152 The Local Management Scheme in schools

EAST SUSSEX Education Department, ? 1983.

Draft notes explaining the operation of the Authority's Schools' Local Management Scheme. Participating schools receive a lump sum to cover many elements of expenditure, such as heating, lighting, telephone, postage and capitation allowance. Schools can determine their own priorities for expenditure and savings on one element may be reallocated to another.

7 pages plus appendices.

SCHOOL YEAR

153 An alternative pattern: the four-term year

CAMBRIDGESHIRE Education Department, 16 May 1983.

Consultative paper, recommending that further consideration be given to the introduction of a four-term year. Reviews the three-term pattern, sets out the advantages and disadvantages of an alternative, and concludes that the four-term pattern would improve the use of resources and school time, and be better suited to the changing interests of the community.

6 pages.

SECONDARY EDUCATION

154 Secondary education: further developments

INNER LONDON EDUCATION AUTHORITY, 16 November 1982.

Sub-Committee report recommending a comprehensive programme of action to meet a number of major concerns relating to secondary education, in particular, low achievement in public examinations and non-attendance. Reviews ILEA initiatives and proposes: the setting up of a group to examine curriculum issues; an increase in 'extended day' provision; a substantial programme of work on graded tests; further work on record keeping/profiling; a working party to examine careers education and guidance; and promotion of parental involvement in schools.

11 pages.

SPECIAL EDUCATION

A separate bulletin, Special Education: Education Act 1981, listing 23 abstracts of LEA papers concerned with the implementation of the 1981 Act, is available on request from EMIE.

STAFF APPRAISAL

155 Staff appraisal

David Warwick

EDUCATION FOR INDUSTRIAL SOCIETY, January 1983.

Booklet in the 'Management in Schools' series. Proceeding from a case study, the author sets out the functions of staff appraisal in schools, describes the introduction of an appraisal scheme, and makes suggestions concerning job descriptions, appraisal interviews and staff assessment.

20 pages.

*Available, price £1.25 from: Education for Industrial Society, Robert Hyde House,
48 Bryanston Square, London W1H 7LN.*

TRANSITION FROM SCHOOL TO ADULT LIFE

156 The Careers Service - current position and future developments

EAST SUSSEX Education Department, 26 November 1982.

Sub-Committee paper, assessing the Careers Service workload and anticipated needs, taking into account the likely impact of the Youth Training Scheme. Because of staffing reduction in 1980, the Careers Service has been introducing a new approach which involves moving away from the concept of the individual guidance interview and towards the careers officer acting as a specialist consultant, using group interviews, referral interviews and self-referral by students. Also, a working group has been investigating computerisation of vacancy matching. Recommends six additional careers officer posts to enable the service to cope with current and expected demands.

6 pages.

157 Education for 16-19's in Surrey

SURREY Education Department, 18 March 1983.

Paper for consultation to 31 July 1983, prepared as the outcome of the discussions of a Working Group of Members on 16-19 Course Provision and Admissions. Concerned with the distribution of 16+ courses between institutions, particularly in the light of falling rolls. Matters considered include: the respective roles of schools, sixth form colleges and further education colleges; course development; one-year 16+ courses; admissions policy; and establishment of 'collegiate boards' to achieve coordination between providers of courses.

11 pages.

TRANSITION FROM SCHOOL TO ADULT LIFE continued

158 Skelmersdale College - request for change in status

LANCASHIRE Education Department, 8 March 1983.

Extract from the minutes of the General Purposes Sub-Committee, recording a recommendation (approved by the Education Committee) for a change in the status of Skelmersdale College from a sixth form college to a college of further education. An appendix presents the Governors' case for the change. The College, which has experienced a significant increase in students aged 19+, includes FE courses and MSC-sponsored courses in its provision.

11 pages.

TRANSITION FROM SCHOOL TO ADULT LIFE - *YOUTH TRAINING SCHEME*

159 Supporting YTS. Guidance for colleges and others involved in the MSC Youth Training Scheme

FURTHER EDUCATION UNIT, May 1983.

Intended as a 'brief' to help colleges to negotiate the best possible educational component into YTS. Deals with: induction, assessment, planned work experience, occupationally based training, off-the-job training/education, occupational 'core areas', guidance and support, recording and reviewing progress, staff development, and evaluation. Each section refers to appropriate MSC criteria and then describes how these relate to FEU and other educational perspectives. Appendices include three examples of YTS projects: South Bedfordshire Training Centre, Heathfield High School (Cheshire), Project Wirral.

92 pages.

Available free of charge from: Publications Despatch Centre, Department of Education and Science, Honeypot Lane, Canons Park, Stanmore, Middlesex HA7 1AZ.

160 Youth Training Scheme

CHESHIRE Education Department, January/March 1983.

Four papers concerned with: schools' involvement in YTS (including guidelines sent to secondary heads); supervision of the Department's Mode A scheme; schemes for clerical trainees and technicians in the Education Department; and a scheme for social care trainees (devised for Social Services).

23 pages.

161 Youth Training Scheme

STAFFORDSHIRE Education Department, 18 March 1983.

Papers prepared for a members' conference on the Youth Training Scheme, held on 18 March 1983, and giving information on: the contribution of FE colleges in Staffordshire, youth service schemes, industrial/commercial organisations providing training for the young unemployed, the role of the Careers Service, and the County Council's involvement (including a school-based scheme). Booklets for employers and school leavers on YTS are also attached.

17 pages plus 2 accompanying booklets.

162 Youth Training Scheme - staff development programme

BOLTON Education Department, ? 1983.

Provides feedback concerning responses to staff development activities organised in Bolton. The greatest demand occurs in the areas of residential education, experiential learning, the monitoring of work placements, and negotiation of the curriculum. Three areas are proposed as priorities for staff development early in 1983: profiling, teamwork, and skills for work with special needs groups. Appendices include MSC information on: criteria for the content of YTS schemes; Occupational Training Families; and design elements of YTS.

8 pages plus appendices.

163 Youth Training Scheme Working Party - report to Policy and Resources Committee, 19 April 1983

WOLVERHAMPTON Education Department, 1983.

Provides a breakdown of anticipated YTS places to be offered by employers and by the Local Authority. Makes recommendations concerning complementary education services (including counselling and advisory services, in-service training, assessment), organisation and premises, and careers service involvement (including computerisation of records). Financial implications are covered, and the paper includes Trade Union statements on YTS.

29 pages.

EMIE can also provide papers on the Youth Training Scheme from the following LEAs (or a more detailed abstract if required):

164 BOLTON (information for schools, dated March 1983, and outlining YTS developments at national and local level.)

165 CUMBRIA (Sub-Committee paper dated 22 March 1983, summarising progress with YTS and proposing that the Authority's provision should be coordinated by the colleges.)

166 DONCASTER (Sub-Committee paper dated 8 March 1983, outlining the Authority's submission to act as a managing agency providing 500 work experience places.)

167 EAST SUSSEX (Sub-Committee paper dated 8 March 1983, summarising YTS places to be offered in the Authority, and noting a proposal for a training workshop under the auspices of the Youth Service.)

168 HARROW (Sub-Committee paper dated 21 March 1983, covering types of provision, teaching costs, number of trainees, accommodation, staffing, etc.)

TRANSITION FROM SCHOOL TO ADULT LIFE - *YOUTH UNEMPLOYMENT*

169 The County Council's response to youth unemployment ... City and Guilds courses - pilot scheme

EAST SUSSEX Education Department, November 1982.

Sub-Committee paper, reporting on the first two months of operation of a City and Guilds pilot scheme, involving cooperation between secondary schools and FE colleges, and designed for students with 'modest' examination achievements at 16. Comments briefly on costs, benefits, and likely future developments.

3 pages.

170 Courses for unemployed school leavers

INNER LONDON EDUCATION AUTHORITY, 8 March 1982.

As part of the Authority's response to unemployment in summer 1981, courses were offered in secondary schools for young people who had planned to leave school but had failed to find employment. The paper gives a brief description of the provision made at each school.

6 pages.

APPENDIX J

EMIE PUBLICATIONS APRIL 1982 - OCTOBER 1984

Education management abstracts

No. 1	April 1982
No. 2	October 1982
No. 3	March 1983
No. 4	July 1983
No. 5	July 1984

'Special topic' abstracts bulletins

- Falling school rolls and the management of contraction: curriculum and staffing implications (October 1982)
- Special education: Education Act 1981 (July 1983; second edition March 1984)

EMIE newsletter

No. 1	July 1981
No. 2	April 1982
No. 3	December 1982
No. 4	November 1983
No. 5	August 1984

Consultants' reports

- Falling school rolls and resource constraints: a brief review of LEA documentation. (David Coatesworth, John Hudson, Brian Kay and Margaret Sproat, April 1982)
- Falling school rolls and resource constraints 2: a commentary on curriculum and staffing. (Brian Kay, October 1982)
- Education Act 1980: a brief review of LEA documentation. (James Revell, April 1982)
- Financial devolution to schools. (John Hudson, February 1984)
- Implementation of the Education Act 1981. (Fred Adams, March 1984)
- Records of achievement for school leavers (profiles). (Michael Johnson, April 1984)
- The school curriculum: Circulars 6/81 and 8/83. (George Cooke, August 1984)

Questionnaire surveys

- Administrative use of computers by local education authorities (carried out on behalf of the Society of Education Officers' Industry Committee). Report: November 1983

Questionnaire surveys cont'd

* 'In-house' research and development in LEAs (carried out on behalf of the Local Education Authorities Research Group). In preparation October 1984.

Briefing papers/discussion documents

* Training for heads and senior staff of schools (revised October 1983)
* New Technical and Vocational Education Initiative (September 1983)
* School self-evaluation (March 1984)
* Small schools (August 1984)
* School discipline (in preparation October 1984)

Industry Committee Newsletter

(Published on behalf of the SEO Industry Committee)

No. 1	May 1983
No. 2	November 1983
No. 3	April 1984

Recent SEO documents

(Reference list of SEO papers, published on behalf of the SEO)

July 1982
July 1983
July 1984

Articles about EMIE

* DES funds new policy clearing house service (Times Educational Supplement, 2 April 1982)
* EMIE: the answer to a few LEA prayers. How a new information base for education management is taking shape. (Education, 16 April 1982)
* Information service for education officers. (Educational Research News, Spring 1983)
* Editorial (SEO Bulletin, Spring 1983)
* EMIE's secret service? (Where, September/October 1983)
* Meeting demands for information (Education, 27 May 1983)
* Moving towards the information user (Social Science Information Studies, October 1983)
* Computers in administration (Education, 10 February 1984)

Education Management Information Exchange
Society of Education Officers' Industry Committee

ADMINISTRATIVE USE OF COMPUTERS BY LOCAL EDUCATION AUTHORITIES
REPORT OF A QUESTIONNAIRE SURVEY

David Streatfield
with
Sue Thompson

November 1983

EMIE is sponsored by the Department of Education and Science, the National Foundation for Educational Research in England and Wales, The Society of Education Officers, and the Welsh Office.

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TECHNICAL NOTE

The data from the questionnaires were analysed on an IBM 4331 computer using the Statistical package for the social sciences (SPSS). The report was prepared on an IBM Displaywriter.

PREFACE

The importance of information in the management of any service is widely recognised and the application of information technology to educational administration is an issue that has been of concern to the Society of Education Officers for some years. The survey which has now been undertaken by EMIE and the SEO Industry Committee of the administrative use of computers in local education authorities, demonstrates that in various ways 80% of LEAs use computers in administration. Perhaps more striking still is the finding that 67% of LEAs use word processors, since this technology has had much less time to penetrate local government than computers.

The value of this survey is only partly in the following report, which summarises the findings. Largely as a result of this survey EMIE is able to act as a clearing house for information on developments in 1983 within most LEAs. Nowhere else is this information readily available. In a rapidly changing field EMIE will be able to assist education officers as they seek to learn from the experience and practice of others. This applies to the equipment but is particularly relevant to the application of information technology to the processes of educational administration. Applying computers, word processors and other equipment in education departments, has implications for both the software and the administrative systems that surround the software. Other sources of help for LEAs seeking to develop these applications are surprisingly unreliable. This is true, for example, of user groups which ought to be able to bring together LEAs using the same equipment and to act as a stimulus to the dissemination of new ideas but which, in practice, do not have adequate resources to act in this way. The results of this survey are available to LEAs through EMIE and they offer a rich source of help and expertise.

In September 1980 LAMSAC published its Study of the local government computer environment and a comparison between that study and this survey confirms some of the changes which were then identified. In 1980 only some 3% of respondents considered computer-aided decision-making and only about 1% considered computer-aided forecasting to be a high priority. However, when local authorities were asked about the priorities over the period 1980-1985 there was a clear shift away from clerical automation and information retrieval to uses which improved management control, information shared across departmental boundaries, decision-making and forecasting. These trends are evident from the EMIE survey of education departments. The other important area identified by EMIE and not so relevant in 1980 was the use of computers for administration in schools. As the report points out this is an aspect of educational administration that needs much closer examination and coordination.

David Cracknell
Secretary, SEO Industry Committee

Administrative use of computers by Local Education Authorities: report of a questionnaire survey.

PART A: THE SURVEY

1. INTRODUCTION

A questionnaire on the administrative use of computers was prepared by the Education Management Information Exchange in cooperation with the Society of Education Officers' Industry Committee and after consultation with the Local Authorities Management Services and Computer Committee, the Council for Educational Technology and the Institute of Local Government Studies. It was distributed to all local education authorities in England and Wales, as well as Guernsey, Jersey, the Isle of Man and the Isles of Scilly, on March 25th 1983. The questionnaire covered the availability of hardware in LEA administrative offices, in schools and in FE establishments; future availability of hardware; and computer administrative and managerial applications related to schools, further and higher education, special education, careers, and more general areas.

2. THE RESPONSE

By 20th September 1983 completed questionnaires had been returned by 95 of the 108 authorities approached, a response rate of 88%. The response rates for various types of local authority were as follows:

	responses	response rate (% of total authorities)
non-metropolitan counties	43	90
metropolitan boroughs	29	83
London boroughs	18	90
others (ILEA, Guernsey, Jersey, Isle of Man, Isles of Scilly)	5	100

3. AN ARBITRARY NOTE...

In asking about computer hardware, distinctions were drawn in the questionnaire between mainframe/minicomputers, microcomputers, word processors and other forms of information technology. The real world of information technology is increasingly tending to over-ride such distinctions. It is no longer difficult to treat a minicomputer as a stand-alone 'micro' or to link up a series of minis into a powerful constellation capable of performing complex operations. Word processors can undertake tasks usually associated with more sophisticated computers and microcomputers can readily be adapted to word processing activities or be linked into the Prestel network. All this is happening before the more ambitious forms of electronic mail take over and before the new generation of intelligent knowledge-based systems is upon us.

Again, in asking questions, a distinction was made between administrative uses by LEA staff and general administrative functions carried out by other departments on behalf of LEAs. In the corporate world of local authorities, computers can ignore departmental boundaries unless these are reimposed by restricting access to records. When does a payroll record, for example, move from the world of the treasurer to that of the teacher records section of the LEA if it stays in the computer and can be retrieved both by accountants and education officers? One person's general finance may be another's educational administration.

4. ...AND SOME NOTES OF CAUTION

The response rate to the questionnaire was very encouraging but even so there may be interesting or unusual things going on in some of the remaining 12% of LEAs. Some replies were acknowledged to be the joint effort of up to six officers and there was evidence of consultation in many of the returns. Even so there must be doubt whether the full picture in every detail has emerged, especially from LEAs in which there was much computer activity. Some respondents reported that they did not know the full answer to some questions, especially in relation to administrative work in schools. Moreover, the replies summarized below were received over the period from mid-April to the second half of September. Several respondents said that decisions were about to be taken or that new systems were soon to be introduced. With every month the LEA computer scene is changing.

PART B: AVAILABILITY OF HARDWARE

5. USE OF HARDWARE BY EDUCATION DEPARTMENTS

Questions were asked about the availability and use of mainframe and minicomputers, microcomputers, word processors and other forms of information technology such as electronic mail. Of the 95 responses, only 3 LEAs were not using any of these sorts of information technology for education department administration. Of these authorities 2 also reported that computers were not being used for administrative purposes in schools or further education administration. (All 3 of the LEAs concerned were relatively small in terms of pupil and student numbers.)

A more detailed summary of the positive responses is given below.

5.1 Partial or exclusive use of mainframe or minicomputers by education departments for administrative purposes*

76 LEAs (80%) reported that they had partial or exclusive use of mainframe or minicomputers for administrative purposes. The general distribution of these computers amongst the main types of authority was fairly even. 84% of non-metropolitan counties, 79% of metropolitan boroughs and 83% of London boroughs reported use of this equipment. The most frequently cited of the 11 manufacturers mentioned were:

ICL (all models)	32	(42% of mainframe/mini users)
IBM (all models)	23	(30% of " ")
Honeywell	10	(13% of " ")

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* Hereafter, all percentages in this report are proportions of the total number of completed responses, unless otherwise stated.

Some LEAs used more than one computer for different purposes. (The most popular 'dedicated' use of a computer or microcomputer for a specific purpose was for student awards (mentioned by 11 LEAs).

The pattern of distribution of the two most popular manufacturers varied between the three main types of authority:

	IBM		ICL	
non-metropolitan counties	13	(30% of n-mcs)	14	(33% of n-mcs)
metropolitan boroughs	3	(10% of mbs)	13	(45% of mbs)
London boroughs	7	(39% of Lbs)	4	(22% of Lbs)

5.2 Use of microcomputers primarily or exclusively by education administrators

53 LEAs (56%) reported that microcomputers were kept for use by education administrators (rather than for use directly by schools and colleges). Some variation was noted in the responses from non-metropolitan counties (65%), metropolitan boroughs (45%) and London boroughs (56%).

The most frequently cited of the 22 manufacturers mentioned were:

Commodore (all models)	18	(34% of microcomputer users)
RML 380Z	12	(23%)
Apple	6	(16%)
BBC (both models)	6	(11%)

Again, several LEAs reported using more than one make of microcomputer for administrative purposes.

5.3 Use of word processors by education departments

64 LEAs (67%) used word processors, reflecting a rapid advance in this area of the market. 6 of these authorities noted that the facility was local authority-wide or located outside the education department. Fewer of the metropolitan boroughs (62%) were using this form of technology than were the non-metropolitan counties or London boroughs (both 72%). The leading manufacturers amongst the 19 mentioned were:

IBM	13	(20% of word processor users)
ICL	9	(14% " " ")
AES	8	(13% " " ")
Commodore	7	(11% " " ")
Wang	7	(11% " " ")

The major computer manufacturers are clearly involved in a struggle for this market with a number of specialist firms.

To what extent word processors have been introduced into LEAs is difficult to gauge because only 26 respondents stated the number of work stations in use within the education department. These varied between 1 and 9.

Some respondents volunteered information about a variety of uses to which word processors were being put; most frequently mentioned were the compilation of committee agendas, reports and minutes (14 LEAs; 22% of users) and the preparation of standard letters (8 LEAs; 13% of users). It seems likely that word processors elsewhere are being used for similar tasks.

5.4 Use of other forms of information technology for administrative purposes

A minority of LEAs (12%) were using other forms of information technology such as electronic mail (5 authorities with 3 more planning experimental implementation) or Prestel (10 authorities). A significant initiative here is the 'office of the future experiment' in which two county authorities are working with different computer manufacturers to develop electronic office facilities. Both experiments are involving the education department.

6. USE OF COMPUTERS FOR ADMINISTRATIVE PURPOSES BY THE STAFF OF SCHOOLS

76 LEAs (80%) reported that computers (usually microcomputers) were being used for administrative purposes in schools. This sort of activity was less often discovered in metropolitan boroughs (66%) than in non-metropolitan counties (86%). All the London boroughs reported some activity. Apart from the 19 LEAs in which it was claimed that schools were not using computers for administrative purposes, 9 respondents did not know to what extent schools were using computers in this way and 3 others were uncertain about the extent of use (a total of 16% of the user authorities).

Making due allowance for the fact that the questionnaire replies were usually made by headquarters-based education officers and that various lists could easily be produced unofficially on an 'educational' microcomputer without attracting much attention, it may be seen as disturbing that such an important new administrative tool is being introduced more or less haphazardly in many LEAs. The fact that a number of commercial software houses are beginning to offer schools administration packages amongst their wares indicates something of the potential of the schools administrative computing market.

There is evidence that some LEAs are trying to ensure planned, or at least regulated, growth in administrative computing. 6 LEAs declared various pilot or experimental schools administration schemes, 9 had set up working parties to consider this issue, 3 were in other ways reviewing the topic and 4 were building up some form of communications network linking schools with the headquarters computer.

The main school-based applications are summarized in a later section.

7. USE OF COMPUTERS FOR ADMINISTRATIVE PURPOSES BY FURTHER EDUCATION STAFF

75 LEAs (79%) recorded some level of computer-based administrative activity in further education establishments, with little variation across different types of authority. The various activities described fell into two broad categories. The 'externally focussed' administrative requirements for staff returns, student enrolments and awards were frequently met through the department's (or authority's) computer, sometimes through a terminal in the college. On the other hand colleges had shown considerable independence in turning their own computer facilities to 'in-house' administrative use and there is some evidence of attention being paid to managerial as well as routine administrative requirements. The Further Education Management Information System was mentioned in 11 completed questionnaires (15% of LEAs active in further education administrative computing).

8. FUTURE AVAILABILITY OF HARDWARE

Respondents were asked about whether their department planned to obtain any information technology equipment (for the first time, or in addition to existing hardware) within the next two years. The responses are summarized below:

	responses	%	plans	definite plans
no plans	14	15		
not yet decided	18	19		
provisional plans (e.g. subject to committee approval)	13	14		
feasibility study/ working party	5	5	82%	
pilot project/trial	4	4		
feasibility study or review and other action	4	4		49%
acquisition of hardware	34	36		
no reply	3	3		

Several respondents described more than one planned development. Most frequently mentioned were:

	responses	%
acquisition of word processors	24	25
acquisition of microcomputers	20	21

	responses	%
addition of terminals to mainframe(s)	18	19
linking micros to mainframe(s)	11	11
developing DRS (distributed resource systems - usually ICL)	9	9

Development of resources for the careers service (usually in relation to the Youth Training Scheme) was a stated aim in 8 LEAs.

A relative lack of involvement with information technology for administrative purposes by metropolitan boroughs when compared with non-metropolitan counties and London boroughs has been noted earlier in relation to microcomputers, word processors and schools use. Similarly metropolitan boroughs (45%) more frequently reported having no plans or having not yet decided about future equipment, than did London boroughs (33%) and non-metropolitan counties (27%). (These percentages have been adjusted to eliminate the 3 non-responses).

PART C: COMPUTER APPLICATIONS

A list of 32 computer-based administrative and managerial functions was provided and respondents were asked to tick boxes indicating whether a mainframe/minicomputer or microcomputer facility was operating or being planned in the LEA. Space was then provided for the description of any other administrative records or information for senior management purposes compiled or being planned in the LEA. The responses to the list are considered below in three sections. For further details see the appendix.

As with any such prescribed list, care should be taken in interpreting the results. The necessity to describe an activity in a few words leaves some scope for differences of meaning to occur. For example, 'transport of pupils' may indicate a range of activities from maintaining a list of pupils entitled to 'bus passes, through to an elaborate logistical tool. Similarly 'FE awards' may refer to the base information stored to enable grant payments to be made or, as in one reported instance, to a system designed to carry out student grant assessments.

9. MAINFRAME/MINICOMPUTER FACILITIES OPERATING

The most frequently reported current mainframe/minicomputer applications were:

	responses	%
Salaries and sick pay procedures	58	61
Further education awards	56	59

	responses	%
Education financial procedures (e.g. invoices, allowances)	54	57
Student enrolment records	50	53
CASCAID (careers information)	44	46
School examination results	39	41
School meals and catering	34	36
School population analysis/ pupil projections	31	33
Personnel records (other than teachers)	28	29
Teacher staffing records	27	28

These applications share certain characteristics: most are concerned with organising information on an education authority-wide basis, several (including the first three) are essentially financial administration systems or contain a substantial financial component, most are accumulating small amounts of information about a large number of 'cases', and many could be viewed as local authority applications rather than being purely educational in scope. Together, these applications reflect the main concerns of the 'first generation' of local government computing, in which the pace was usually dictated by treasurers' and personnel departments and the emphasis was on the routine administration of repetitive tasks.

The attention given to further education awards is interesting in that this constitutes one of the few areas of educational administration in which immediate savings in staff time and an increase in efficiency can be anticipated. It should be emphasised that the situation reflected here is not static. 53 of the applications which were reported as operating on mainframe/minicomputers were also the subject of further plans, notably school meals and catering (8), education financial procedures (7) and FE awards (5). (For further details see table 1 in the appendix).

10. MICROCOMPUTER FACILITIES OPERATING

It was apparent from comments made in various questionnaire responses that the extent of use of microcomputers for administrative purposes, especially in schools, is difficult to gauge and has probably been under-reported here. This under-reporting is due to several factors: the questionnaires were usually completed by headquarters-based education officers, 'unofficial' use of school micros for various administrative tasks may be widespread (especially if the LEA discourages 'non-educational' use of school micros) and most LEAs lack an overall policy for computer administration.

The most frequently reported applications were:

	responses	%
School timetabling or option blocks	36	38
School curriculum analysis	20	21
School roll returns, Form 7 and other pupil statistics	18	19
School population analysis/pupil projections	16	17
School examination results	16	17
Student enrolment records	15	16
Careers information system (other than CASCAID, JIIGCAL)	13	14
Pupil test records	12	13
School capitation allowances	12	13
School meals and catering	11	12

Of the 10 most frequently cited microcomputer applications 8 are applications directly concerning schools.

(See table 2 in the appendix for further details.)

11. FACILITIES BEING PLANNED

The most frequently reported facilities being planned were:

	responses	%
Pupils/students with special educational needs	41	43
Teacher staffing records	40	42
Personnel records (other than teachers)	39	41
Careers information system (other than CASCAID, JIIGCAL)	38	40
School roll returns, Form 7 and other pupil statistics	35	37

	responses	%
School population analysis/pupil projections	32	34
College student population analysis/projections	29	31
School meals and catering	29	31
School admissions	27	28
School curriculum analysis	25	26

It is interesting to note here a shift away from the 'first generation' LEA preoccupation with financial accounting in favour of various sorts of 'people records'. A longer-term trend towards computerisation as an aid to management decision-making can also be detected both here and in the comments made by respondents.

The emphasis on pupils/students with special educational needs was predictable in view of the implementation of the Education Act 1981. In this instance only a few LEAs reported an application in operation, 5 using mainframe/minicomputers and 3 using microcomputers, so that it should be possible to make information about their systems more widely available to the potential benefit of 43% of LEAs.

(Further details can be found in table 3 of the appendix).

12. OTHER APPLICATIONS

In addition to the 32 computer applications included in the questionnaire list, respondents reported a further 57 administrative and managerial functions as operational or being planned.

The difference in emphasis in the use of mainframe and microcomputers was again evident. Most frequently reported as additional mainframe applications were financial and budget control/monitoring systems, mentioned by 13 respondents (14%), with a further 10 LEAs (11%) planning to introduce services in this area; and accommodation, sites, buildings and property records with 7 mentions (7%). Prominent microcomputer applications in operation included pupil records systems, noted by 10 LEAs (11%); and various aspects of information on teaching staff such as staff forecasting, allocation/deployment/ selection, curriculum-based staffing, and teacher absence cover/ substitution (each of these 4 topics was mentioned by 4 LEAs).

Turning to future plans, 9 LEAs (9%) expected to introduce the Further Education Management Information System (2 others had already done so), and pupil records systems or student records systems were each being considered in 4 LEAs.

Since all these topics were volunteered by respondents it is likely that various other LEAs have broadly similar schemes in operation or preparation. Some of these topics may have been partially reported elsewhere under different headings. For example, respondents may have indicated their interest in pupil or teacher records systems by ticking boxes in the questionnaire list relating to school population analysis/pupil projections or teacher staffing records respectively.

(For a list of the 22 most frequently cited additional applications see table 4 in the appendix).

13 UNUSUAL APPLICATIONS

Respondents were asked to declare any applications in their department which they considered to be unusual and likely to be of interest to other education authorities. 27 applications were singled out in this way, ranging from programmes for secondary school administration to a property data base, and from a corporate combined welfare benefits scheme to a tertiary education management system. Some of these developments were particularly ambitious, such as a management information systems resource analysis programme for further education which covered "SSR returns, FESR, lecturer timetable logs, teacher contact ratios, teaching group sizes, attendance patterns, pooling returns, notional and actual course lengths"; other applications offered some advance on approaches elsewhere in relation, for example, to pupil records systems, school roll forecasts or the school meals system.

Attention will be drawn to these unusual applications when enquiries are dealt with by staff of the Education Management Information Exchange.

14 CONCLUSIONS

Two overall trends are apparent from this survey. LEAs (and particularly those in non-metropolitan counties) are rapidly introducing computer-based technology to support their basic administration at a time when staff and resources are severely restricted. The possibilities presented by word processing systems have been readily noted by LEA staff but it is also apparent from recent EMIE training workshops that the approach to the wonders of information technology is being governed by a strong awareness of the potential pitfalls as well as the likely benefits of the new systems.

Attention has already been drawn to the shift away from exclusive emphasis on financial administration systems and to the growing interest in better 'people records', and in the potential scope of computer-based systems as an aid to management decision making. Some conflict is, however, apparent between the desire to create better management systems as viewed by education officers and the traditional reluctance in education departments to interfere with the autonomy of schools and further education establishments.

Two dangers in the resulting 'laissez faire' attitude to computer administration, especially in schools, are that much local effort may be wasted because it is based on insufficient expertise trying to utilize insufficiently powerful equipment, and that unless the schools organise themselves to the point where they can specify their requirements for administrative packages in a lucid and forceful manner, they will be at the mercy of software manufacturers seeking additional outlets for not very appropriate packages.

15 FURTHER WORK

Two graduate students from the Department of Information Studies at the University of Sheffield carried out follow-up visits in 12 LEAs to add to information already supplied and to investigate some aspects of computer use for administrative purposes more fully. A report on this work will be made available later this year.

16 ACKNOWLEDGEMENTS

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David Streatfield
Project Head, EMIE Project
September 1983.

APPENDIX

COMPUTER-BASED ADMINISTRATIVE AND MANAGERIAL FUNCTIONS AS REPORTED BY QUESTIONNAIRE RESPONDENTS: COMPLETE LISTS.

PART A: ITEMS LISTED IN THE QUESTIONNAIRE FOR TICKED BOX RESPONSES

Table 1: Mainframe/mini facility operating

	LEAs	% (n=95)	
Salaries and sick pay procedures	58	61	
Further education awards	56	59	
Education financial procedures (e.g. invoices, allowances)	54	57	
Student enrolment records	50	53	50% or higher response
CASCAID (careers information)	44	46	
School examination results	39	41	
School meals and catering	34	36	
School population analysis/ pupil projections	31	33	
Personnel records (other than teachers)	28	29	
Teacher staffing records	27	28	
School capitation allowances	26	27	
School roll returns, Form 7 and other pupil statistics	26	27	
School timetabling or option blocks	26	27	
Recoupment and inter-authority payments	25	26	
College student population analysis/ projections	24	25	25% or higher response
Careers information system (other than CASCAID, JIIGCAL)	22	23	
College examination results	16	17	

	LEAs	%	
JIIGCAL (careers information)	16	17	
Pupil test records	14	15	
Fuel supplies and delivery	12	13	
Transport of pupils	12	13	10% or higher response
School curriculum analysis	9	9	
Furniture and equipment records/stock control	7	7	
Transport of FE students	7	7	
College timetabling	7	7	
College student test records	6	6	
Pupils/students with special educational needs	5	5	
School admissions	5	5	
School attendance	5	5	
Work experience placements	5	5	
Accommodation records for specific colleges	4	4	
Accommodation for special education	3	3	

Table 2: Micro facility operating

School timetabling or option blocks	36	38	25% or higher response
School curriculum analysis	20	21	
School roll returns, Form 7 and other pupil statistics	18	19	
School population analysis/pupil projections	16	17	
School examination results	16	17	
College student enrolment records	15	16	

	LEAs	%	
Careers information system (other than CASCAID, JIIGCAL)	13	14	
Pupil test records	12	13	
School capitation allowances	12	13	
School meals and catering	11	12	
College timetabling	10	11	10% or higher response
College examination results	8	8	
College student test records	7	7	
Teacher staffing records	7	7	
College student population analysis/ projections	6	6	
Education financial procedures (e.g. invoices, allowances)	6	6	
Transport of pupils	5	5	
Work experience placement	5	5	
Accommodation records for specific colleges	4	4	
CASCAID (careers information)	4	4	
Furniture and equipment records/stock control	4	4	
School admissions	4	4	
Further education awards	3	3	
JIIGCAL (careers information)	3	3	
Pupils/students with special educational needs	3	3	
Salaries and sick pay procedures	3	3	
Accommodation for special education	2	2	

	LEAs	%
Fuel supplies and delivery	2	2
Personnel records (other than teachers)	2	2
Recoupment and inter-authority payments	1	1
School attendance	1	1
Transport of FE students	1	1

Table 3: Facility being planned

Pupils/students with special educational needs	41	43
Teacher staffing records	40	42
Personnel records (other than teachers)	39	41
Careers information system (other than CASCAID, JIIGCAL)	38	40
School roll returns, Form 7 and other pupil statistics	35	37
School population analysis/pupil projections	32	34
College student population analysis/projections	29	31
School meals and catering	29	31
School admissions	27	28
School curriculum analysis	25	26
College examination results	24	25
School capitation allowances	24	25
Transport of pupils	24	25

25% or higher response

Accommodation records for specific colleges	23	24

	LEAs	%	
College timetabling	23	24	
Furniture and equipment records/stock control	23	24	
School examination results	23	24	
JIIGCAL (careers information)	23	24	
Recoupment and inter-authority payments	22	23	
Education financial procedures (e.g. invoices, allowances)	20	21	
Further education awards	20	21	
College student test records	17	18	
Work experience placements	17	18	
Salaries and sick pay procedures	16	17	
Student enrolment records	16	17	
Pupil test records	13	14	
Accommodation for special education	11	12	
Fuel supplies and delivery	10	11	
School attendance	10	11	10% or higher response
School timetabling or option blocks	9	9	
Transport of FE students	8	8	
CASCAID (careers information)	6	6	

PART B: ITEMS REPORTED BY RESPONDENTS (NOT INCLUDED IN THE BASIC LIST)

Table 4: Other applications reported by respondents (items cited more than once)

	Mainframe/ minicomputer	Microcomputer	Facility planned
Financial and budget control/monitoring	13	4	10
Pupil records systems	3	10	4
Further Education Management Information System	-	2	9
Accommodation, sites, buildings, property	7	3	1
Teaching staff allocation/ deployment/selection	3	4	1
Student records systems	3	1	4
Adult education	3	1	3
Curriculum-based staffing	2	4	-
Teacher records systems/ profiles	3	-	3
Committee information	1	1	3
Governing body information	2	-	3
Teaching staff forecasting	1	4	-
Aids to pupils	2	-	2
Building maintenance	3	-	1
Student examinations entry	2	2	-
Teacher absence cover/ substitution	-	4	-
Accident records	2	-	1
Part-time teacher records	-	2	1
School examinations entry	-	2	1

	Mainframe/ minicomputer	Microcomputer	Facility planned
Welfare grant awards	-	-	3
School lettings	1	1	-
Special education procedures	-	2	-

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REPORT ON MEETINGS WITH EMIE LINK PEOPLE

(Report to the Project Steering Committee, November 1982)

EMIE Project: Report on meetings with EMIE Link-people: July-September 1982.
Report to the EMIE Project Steering Committee by the Project Leader.

1. INTRODUCTION

What follows is an attempt to outline the main themes discussed during the recent programme of meetings with EMIE Link-people and to report some of the interesting points raised. The main decisions arrived at as a result of these meetings are presented in the November 1982 issue of the **EMIE Newsletter**.

2. THE MEETINGS

Four meetings were held in Birmingham, Leeds and London (2). 71 LEAs were represented at these meetings by EMIE Link-people or their nominees (72% of the total eligible).* This total includes one of the two Welsh authorities involved in the earlier phases of EMIE development.

The format adopted for two of these meetings was to hold a morning session for LEA representatives from authorities involved in the EMIE experimental phase between October 1981 and March 1982. This took the form of a review of services provided in that period and of any problems which had arisen in contributing to or using the service. The afternoon sessions in all four meetings consisted of a brief review of EMIE progress followed by group discussion of educational priorities in the forthcoming year and of the potential role of EMIE in providing information.

3. REVIEW OF THE EMIE EXPERIMENTAL PHASE

Discussion focussed on the publications produced by EMIE, on the work of the Project Consultants, on the enquiry service, and on the experience of Link-people during the experimental phase.

3.1 EMIE PUBLICATIONS

Participants reported a positive reaction from colleagues to the **EMIE Education Management Abstracts** issued in April 1982. It was agreed that the size and layout were appropriate and there was some discussion about the ideal frequency of publication with majority support for a quarterly publication. One minor but significant point which was favourably noted at the last meeting was that the 'LEAs only' restriction imposed on this bulletin was being strictly applied by EMIE staff so that even staff of other NFER projects were unaware of its contents. The idea of a single theme abstracts bulletin summarizing recent documents on topical issues (e.g. curriculum-led staffing) was welcomed and it was also suggested that abstracts of the documents mentioned in future Consultants' reports might be appended to these reports. A point emphasised in discussion was that the abstracts reflected a selection from the material that EMIE

*Another EMIE Link-person, who was unable to attend any of the meetings, made comments on all the topics covered, in a meeting with the Project Leader in September 1982. These have been incorporated in this report.

had received rather than 'best current practice'.

The **EMIE Newsletter** (no.2, issued in April 1982) was seen as primarily of interest to EMIE Link-people but it was agreed that enough copies should in future be provided to allow for wider distribution at the discretion of Link-people. It was also suggested that a copyright waiver statement be included in future issues of the **Newsletter** so that multiple copies could be made and distributed locally.

The **EMIE introductory leaflet** was approved as a basic outline of services and it was noted that this leaflet is due for revision in March 1983 at which point any suggested amendments could be incorporated.

Another version of the leaflet (distinguished by its blue cover) had been prepared for non-LEA enquirers about EMIE services. It was agreed that Heads and other teachers approaching EMIE should receive this version of the leaflet and be informed of their LEA Link-person.

3.2 CONSULTANTS' REPORTS

Two reports on **Falling school rolls and resource constraints** and **Education Act 1980** were prepared by EMIE Project Consultants on the basis of documents obtained from LEAs by EMIE staff and were distributed to LEAs in June 1982. A number of points made in discussion were later reported to the meeting of EMIE Project Consultants in November 1982:

i) it was recognised that there was a problem in preparing a report on the 1980 Education Act before the first round of appeals under the Act had been experienced by LEAs. Nevertheless some doubts were expressed on behalf of two authorities which had contributed about the use made of their material. Overall, this document received a mixed response but there was general support for a follow-up study;

ii) most participants reported that the Consultants' papers on aspects of falling rolls and resource constraints were useful or interesting. Some unevenness of content was noted and this was largely attributed to the variable amount and quality of information provided initially. Proposed follow-up studies on aspects of curriculum and staffing policy were welcomed;

iii) an interesting argument was pursued (but not resolved) about the nature of the Consultants' role as commentator. This argument can be represented by two of the views expressed: on the one hand it was argued that Consultants are a valuable 'extra' to the main thrust of the EMIE service, that they should be asked to make trenchant comments when they see these as appropriate, and that "*EMIE will not be jeopardised if the Consultants take risks*"; on the other hand a participant insisted that "*Polemic should be kept for the pages of Education*". One danger perceived was in assuming that experienced Consultants could be totally objective in reading 'political' committee documents - "*It isn't possible to objectively restructure knowledge*";

iv) two participants complained that the time allowed for contributing authorities to respond to the draft Consultants' reports before wider circulation was too short.

3.3 REQUESTS FOR DOCUMENTS AND ENQUIRIES

Sixty requests for copies of documents cited in **EMIE Abstracts** were received from thirty six authorities by September 16th, resulting in three hundred and two copies or loans being provided.

Eighty-five enquiries had been received between 1st April and September 16th 1982 covering a wide range of topics such as lunchtime supervision in schools; early retirement; student loans; pupil forecasting; corporal punishment; teaching career structures; class size and pupil performance; and various aspects of the seven 'EMIE themes'.

General satisfaction was expressed with the enquiry service and it was agreed that the build-up of requests should form an element in evaluating the service. Difficulties were, however, anticipated in making realistic judgements about the usefulness of a service on the basis of simple enquiry records. The Project Leader outlined the case study approach to enquiry monitoring which will be applied as the service develops but stressed the importance to EMIE of receiving feedback through the response postcards enclosed with documents and written replies to questions.

3.4 THE ROLE OF LINK-PEOPLE

Discussion covered such issues as the difficulty of involving and motivating colleagues to use EMIE and problems of keeping up-to-date with developments in parts of the service other than the specialism of the Link-person. One participant said that he had circulated memos to colleagues to alert them to the arrival of EMIE materials but now felt it would be better to call short meetings focussed on EMIE publications e.g. **EMIE Abstracts**. Two ideas for promoting EMIE received considerable support:

i) inclusion of an occasional agenda item at senior officers' meetings to allow participants to assess material received from EMIE and encourage contribution to the service from the LEA;

ii) alerting people to EMIE as an information source when they were asked to prepare policy or discussion papers for the management team.

(See also section 8 below).

3.5 WALES

Concern was expressed that LEAs in Wales were not yet involved in the EMIE network. Both of the 'eligible' Welsh authorities (i.e. those which were involved in the pilot and experimental phases of the Project) have expressed concern about the current position and have stressed the importance of access to the English LEAs when gathering information.

4. REVIEW OF PROGRESS

The afternoon session at each meeting commenced with a review of progress to date. Several specific questions were answered about the operation of the EMIE services. Group discussions followed.

5. FUTURE ACTIVITIES: DOMINANT THEMES

Discussion group participants were asked what issues or problems they anticipated as being of most importance in their authority over the next year. A number of participants stressed that all issues are affected by the continuing pressure to finance the education service and one argued that this might limit their ability to respond to what he saw as EMIE's natural developmental role with its emphasis on initiatives, innovations and sharing of experience.

Not surprisingly, there was a strong consensus about the main issues and problems. The dominant issues mentioned at all meetings (not in rank order) were:

5.1 TRANSITION FROM SCHOOL TO ADULT LIFE

Most of the discussion centred on the new youth training scheme, with special attention being devoted to questions of future funding, local management structures, and the roles of the careers and youth services. Concern was expressed about the relationship between LEAs and the MSC, particularly at regional level, where MSC was undergoing reorganisation at a time when there was much uncertainty about funding from 1983 onwards. Several people asked for information about the structures and stregies being adopted by different LEAs to make participation in the youth training scheme possible. "*It would be helpful to know that X authority has taken on Y staff and is spending £Z to be a managing agent in the next phase*".

5.2 SIXTEEN TO NINETEEN EDUCATION

Various issues were mentioned here. The inter-relationship with the previous theme was stressed and was apparent in the reference to links between secondary and further education, work experience courses, industrial involvement with schools and preparation at school for job seeking and/or unemployment. Reorganisation of post-sixteen education through progress towards tertiary colleges or cooperative arrangements between institutions at sixth form level featured in several discussions. Another recurring theme was the seventeen plus examination.

The question of assessment arose several times and the context was set by one speaker:

"*We are very much aware that 'sixteen to nineteen' is going to be bogged down ... for a variety of reasons there's not going to be a major national initiative - increasingly 'sixteen plus' is going to be irrelevant. Local action by authorities on profiling, on numeracy schemes and on simple processes of recording is likely to be taken up more and more. We are being led or are pushing the local CSE Board to coordinate activity in this area. We have a local numeracy scheme that is going to be extended across the authority. It would be helpful to be in touch with other people doing this sort of thing.*"

5.3 RESPONSES TO THE DES CURRICULUM CIRCULAR No. 6/81 'THE SCHOOL CURRICULUM'

Interest in this theme was succinctly summarised as "*What is happening over* *circular 6/81 and what others have done, are doing and how"*. The question of how to develop curriculum policy was seen as "*an exercise that everyone is going to have to go through*" but enquiries made to the neighbours of a northern authority had so far revealed various responses upwards from "*Nothing at all, hoping it will go away*".

5.4 MANAGEMENT OF CONTRACTION

One group picked falling rolls as the theme for the next year but this view was qualified by others who stressed the importance of secondary education aspects (including school closure, amalgamation and the problems of small schools) or saw the problem as passing in urban areas but growing in large rural areas. It was even argued in one group that since most authorities were in the middle of this problem the time for further information was past. Curriculum-led staffing continued to interest many participants and various aspects of maintaining secondary education at an acceptable level were mentioned too. (*"Picking up on issues brought out by Briault."**)

There appeared to be growing interest in a variety of options for budget savings. This topic was introduced in one group as "*Other authorities' finance priorities - what they are cutting*" and embraced the sensitive question of the relative effectiveness (in financial terms) of different cuts. Various examples were mentioned, including delegation of financial control to schools, methods of payment for services provided by schools (e.g. swimming, music lessons), restructuring the school day, early retirement, charging the over-sixteens for transport and changes in provision of the school meals service. Several authorities were interested in variations in the terms of service for non-teaching staff.

Reduction programmes in certain authorities had brought several problems in their wake, two of which were the task of dealing with staff who were being 're-redeployed' and deciding what to do with surplus school buildings.

Views on the EMIE role will be reported below but two specific suggestions made by individuals in relation to contraction management were that EMIE should conduct a survey of authorities to gather information systematically on some of the topics mentioned and that documents should be sought which "*gave details of the planning as opposed to committee decision papers*".

5.5 SPECIAL EDUCATION

This was seen as an urgent area of activity (especially in relation to the 1981 Act). One dissenting voice argued that "*the issue will fade as it becomes clear that no additional resources will be available for implementation.*" Issues mentioned in the discussion included the increased problem of record confidentiality as a result of several factors including the larger number of children affected, and the difficult link between Education and Health Departments "*especially if LEA and Health boundaries don't coincide*". Resource issues such as the closure of residential schools and establishment of special units (including associated legal problems) were seen as important. The

* BRIAULT, E. and SMITH, F. Falling school rolls in secondary schools. 1980.

problems of assessment (including the potential need for additional psychologists to carry it out) and the INSET implications of any new provision were also discussed. Other issues mentioned were appeals procedures, parental involvement, shared resources between neighbouring authorities and the implications of special education for FE colleges (not covered by the Act).

One group discussed how these issues emerged locally. They commonly arose

i) as resource issues (because of general pressure on budgets);

ii) at a professional level (e.g. questions about the Educational Psychologist's role);

iii) at an operational level (e.g. potential use of resource teams).

There was a fairly unanimous view that LEAs would welcome information on implementation of the Act in other authorities and that EMIE would have a clear role in collecting this. There was a suggestion that EMIE should conduct a survey of LEAs on this theme.

5.6 IMPLEMENTATION OF THE 1980 EDUCATION ACT

Some difference of view was apparent here. A spokesman from a region with a strong local information network argued that this issue was best left to regional groups which could exchange information and clear up issues in an ad hoc way. *"The actual procedures"* he said *"may be very different from what is on the paper"*. He went on to argue that EMIE should concentrate on issues where there were greater discrepancies amongst authorities. Another view was that the Act *"will work its way out"* over the next year or so unless there is amending legislation. On the other hand it was felt that assembling information on problems with appeals would be useful so that ultimately similar procedures could be adopted by most authorities. In this context a follow-up study of appeals experience was seen as helpful by several groups. A number of detailed points were made which will be considered in preparing the follow-up report.

Two participants voiced interest in LEA reactions to the 1980 Act references to school governing bodies and it was predicted that specific legislation would follow on this topic.

5.7 INFORMATION TECHNOLOGY

References to the administrative uses of the 'new technology' and a potential role for EMIE in gathering information about applications were made at all the meetings.

6. FUTURE ACTIVITIES: OTHER THEMES

Several other themes were mentioned in one or more of the discussion groups and are presented below. The order of presentation should not be taken to reflect the relative importance or frequency of mention of a theme.

6.1 ADMINISTRATION OF SERVICES

Topics which could be grouped under this general heading included the organisational structure of departments (*"on paper and in practice"*); industrial relations issues such as the conditions of service of teachers or bonus schemes for ancillary staff; aspects of the functioning of schools; confidentiality of school records with the advent of computerisation; experience of the 'voucher scheme' approach to parental choice; continuity between primary and secondary education; and the community use of schools, with the concommitant financial implications.

Two further issues were raised: the extent to which LEAs were being scrutinised by management consultants (and the resulting recommendations and outcomes); and the question of 'privatisation' of parts of the education service.

6.2 TRAINING

Interest was expressed in what other LEAs were doing about the training of head teachers, school governors and education officers. INSET generally was seen to be threatened in the present financial climate and it was argued that EMIE should have a role in stimulating interest in this area or at least that *"INSET should be kept on the EMIE agenda"*. A more specific matter raised concerned other people's experience of introducing teachers to microtechnology.

6.3 MULTI-CULTURAL EDUCATION

Reference was made to the draft Home Office circular and to its likely impact on LEAs. A related but distinct theme mentioned was 'education for a multicultural society'.

6.4 EDUCATIONAL DISADVANTAGE

As well as widespread consideration of special education in the light of the 1981 Act (see 5.5 above) there was some discussion about more general aspects of educational disadvantage - *"how to assess which pupils and the schools they attend are disadvantaged and what to do about it"*. Various forms of underachievement associated with ethnic, gender and class factors were reported to be under review in some authorities.

6.5 OTHER TOPICS

Other issues raised included:

- phasing out of corporal punishment and the attendant demand from teachers for more resources;
- pupil suspensions;
- LEA guidelines for handling the media;
- the position of voluntary-aided schools, some of which were expanding whilst others presented particular problems in negotiating necessary contraction (see also 5.4 above).

Although, there was strong consensus about the main issues, one discussion group leader noted that participants in his group were keen to mention an area of work in which they felt that their authority was ahead of others. This and the fact that most Link-people have a defined area of responsibility may limit the reliability of the 'other themes' listed here as a general indicator of 'coming issues'.

7. OBTAINING AND USING INFORMATION

Participants furnished numerous examples of incidents which necessitated seeking information from outside the department. These instances were used to lead into discussion of some of the advantages and limitations in using the existing networks or finding other approaches to obtain information. This discussion led in turn to a consideration of the potential role for EMIE in meeting demands for information. The main features of these discussions are outlined below.

7.1 INFORMATION-SEEKING EXAMPLES

Over sixty such cases were outlined or discussed. It would not be possible to report all of them here but a few examples will illustrate the range:

- other people's experience of providing a school meals service using frozen food or of contract cleaning in schools;
- the responsibilities given to school governors in other authorities;
- operation of 'ring fence' approaches to staff recruitment;
- the problem of meeting the needs of the lower age group (9-14) through the youth service;
- language provision for children from ethnic minorities;
- lunchtime supervision in schools.

One example well illustrated the potential effect locally of changes in DES procedures centrally. In this case the amount of information required in submitting proposals to the Secretary of State for new schools or significant changes in character of existing schools was increased with interesting effects:

"In relation to the number of schemes which are likely to have to go up for the Secretary of State's approval, it would be very helpful to know what other LEAs have submitted in their replies to the DES in answer to the 'North Yorkshire document'. The DES has developed 'North Yorkshire' as a guinea pig document, which is the maximum number of questions the DES will ask you for information in support of these proposals when they go in. We had to reply to that document. That causes hours of work and is a total new departure in terms of submitting proposals for reorganisation of schools, 'change of character' and so on. The first experience of LEAs in reply to that letter would be very helpful."

7.2 NETWORKS AND CONTACTS

Most participants relied to some extent upon regional networks of education officers and personal contacts in other LEAs when seeking information from outside the department. Some examples mentioned were the regions of the Society of Education Officers, and examination boards.

It was apparent that networks based on the same national organisations varied in their effectiveness from region to region and that people chose to use particular local networks to obtain information. Judgements sometimes differed about the effectiveness of a particular network and the systems generally were seen as more useful for some purposes than for others.

An example given was the South West region where there was reported to be regular interchange of information between authorities on all kinds of issues. This approach was not seen as aiming at regional equalisation of policy but was exploited because there is a ready-made network to use. Chief Officers and Chairmen of the authorities there meet together on a termly basis. There are also specialist officer regional meetings covering, for example, special education or buildings. They issue occasional regional documents or collations but it was said that a great many information needs are not satisfied through this mechanism, "*I don't think you need to worry about the dual existence of the two systems*".

Significant differences between the regional networks and the EMIE approach are that "*regional groupings do not codify and classify information*" and that there is usually no 'safety net' to retrieve information collated for regional purposes. It was recognised as important that EMIE should relate to and complement rather than compete with other networks. There was a suggestion that EMIE should approach individual LEAs for details of the regional groupings in which they were included.

A number of authorities are involved in other networks based on similarities of size and organisational structure (e.g. metropolitan boroughs). Some of these groupings too are regional in scope but others link up disparate areas (e.g. the four largest shire counties).

Education Officers and Advisers usually developed an extensive range of personal contacts, often made at meetings of bodies like the S.E.O. **Education** and **Where** were mentioned as sources which helped to identify instances of good practice and hence, potential contacts.

The most frequent problems reported with personal contacts were difficulties in locating appropriate people in unfamiliar authorities and the time spent in trying to catch people when they were available ("*The sheer hassle of having to phone around*"). Since contacts were often resorted to when the demand for information was fairly immediate, the time taken up in phone calls could aggravate the problem.

Participants reported using different tactics to overcome these difficulties. When general enquiries to other LEAs were found to be unproductive, attempts were made to identify authorities which had 'made their mark' by achieving good or bad publicity. Some participants resorted to written requests for information but:

"Correspondence is sometimes a problem - phrasing the issues in such a way that the right question is put to someone working from different experience. The information available is often in an inappropriate form."

Using contacts was seen as a fairly haphazard method both because a key contact might not be available and because useful information might be available in authorities which were not known.

8. THE ROLE OF EMIE

Participants made a number of interesting comments about the present and future role of EMIE. How authorities responded to the service was considered by one contributor:

"The abstract of a committee document may be the first 'trigger'. If the document itself is sufficiently interesting the next step will be a 'phone call. If it is very interesting a visit will follow. It is important that the first trigger should be attractive or readable enough to encourage the next stage of enquiry. The EMIE three sentence abstract is a good thing."

A key question was how EMIE could fit into the decision-making process. Various useful points were made, such as that EMIE should concentrate on areas where LEAs have some discretionary power, where there is an element of choice and where LEAs are proceeding at different rates (such as over curriculum-led staffing). It was noted that in the aftermath of legislation it is useful to know what other LEAs are doing if policy is open to interpretation locally. This point was elaborated by another participant:

"Each time there is new legislation we all have to respond to it. Very frequently there is an initial response, then a stocktaking stage at which EMIE could be very helpful ...". It was further suggested that EMIE should differentiate between issues where there is likely to be a common approach, where LEAs are reacting to outside pressure (e.g. through government circular or statute) and issues to do with local forward planning, *"where the approach is more positive and shows greater diversity ... Another range of policy issues that need distinguishing is where the LEA is improving the quality of service it is offering."*

These suggestions about how EMIE might be involved in policy planning as well as operational matters were of particular interest because recent organisational reseach has begun to concentrate upon the previously neglected issue of how information can be used in strategic decision-making. (1) The research suggests that the approach to service provision adopted by EMIE in which the 'clients' are directly involved as contributors to and advisers to the project as well as being users, is more likely to bring about this type of involvement than the relatively detached approach adopted by most libraries and information services. This research and the participants' comments also suggest that there is considerable scope for further exploration of the use of information in decision-making and that EMIE may be able to make a small contribution here. The issue is referred to again later.

An interesting 'user's view' of the EMIE service was reflected in the suggestion that EMIE should find methods of acknowledging that some issues are of short term, others of longer term significance. Equally interesting was the variation in views of the 'service to come' presented in the discussions: participants appeared to be divided between those who looked for a limited information service, others who envisaged a more dynamic and interactive service, and a third group who anticipated more of a research role in which EMIE *"should spell out the premises, look at practice, see how many authorities are doing what and identify pitfalls".*

Particular aspects of the EMIE service were emphasised by different people but the proactive role was seen as significant:

"It is important that what is taken on board is done very thoroughly and that, rather than just wait for things to come in, you go out and chase folk, the ones that you know have something to offer".

This role was seen as a goal rather than an immediate reality by another participant:

"Once EMIE has built up a national data file available on computer i.e. direct access by LEAs, it will have rendered that side of the information exchange as sophisticated as possible; it would then be possible to consider the role of initiator (or in provoking response) as well as co-ordinator."

Turning to the role of Link-people, internal dissemination of EMIE publications appeared to present few problems but aspects of the liaison role with EMIE were seen as difficult to perform especially in a large rural authority or if the Link-person was not well placed in the hierarchy or was too new to the authority to know most things that were going on. Asked how they might seek to 'sell' EMIE to colleagues, one Link-person argued that *"That the information network should be the point of the job, hence we shouldn't try to get enthusiasm for EMIE but enthusiasm for the job."*

The job of the Link-person was presented by one speaker as a 'conscience', reminding people to use EMIE, rather than as a clearing-house for enquiries. This provoked discussion about the effects of such an approach on the Link-person's ability to monitor the service provided and about the increased possibility of duplication of enquiries or donation of documents. It was emphasised that however the Link-people chose to interpret the role there was a need for regular reminders that they had taken on an important function both in relation to their authority and to EMIE.

An interesting tactic proposed was that EMIE should ask Link-people about the precise difficulties experienced in their authorities in relation to EMIE themes. This, it was argued, should enable EMIE to pinpoint sub-themes. Notes on these could be disseminated to obtain pertinent information rather than relying on Link-people to offer information spontaneously.

One participant suggested that EMIE should develop a profile of each authority since local political and financial conditions were likely to affect the sorts of policies being developed and how they were implemented.

Two ways of ensuring that EMIE 'stays on the local agenda' received substantial support. It was felt that such events as receipt of **EMIE Abstracts** could be used to focus attention, possibly by ensuring that an item be included on the senior staff meeting agenda. When people were assigned a task without an 'immediate' deadline (such as preparing a policy paper for the senior staff meeting) it was suggested that they be encouraged to contact EMIE straight away so that when the time came to write the report some material would be available to work with.

9. PROBLEMS FOR EMIE

Two areas of difficulty were forecast when anticipating how EMIE would develop. These centred upon uncertainties in the information available and on the difficulty of bringing about change in people's behaviour.

The use of documents and in particular committee papers was seen as posing several difficulties. It was pointed out that policy often evolves in small stages and may not be adequately documented. An example cited was that of an authority in which a variation was made in the number of forms of entry at sixth form level. This was made as a one-off decision relating to one school but in effect changed the accepted policy for the authority. How could EMIE collect decisions taken in "defiance or ignorance" of published policy statements?

Even if documentation was available it might not be in a suitable form to meet particular needs. *"Committee papers are the easiest thing to put in an envelope and send off but committee papers come right at the end of the process when all the problems have been ironed out"*. The alternative was seen as writing something specifically for EMIE but this required commitment and time.

When committee papers were offered there was some danger of misinterpretation because of the particular use of words, local committee politics, hidden assumptions and other matters which might be clear to the originating authority but not to other readers.

At the other extreme it could not be assumed that if no suitable documentation was available this was because there was no activity.

Use of contacts offered some prospect of overcoming problems associated with document provision but there was some danger of overload in authorities which were recognised as innovative (this might induce a reluctance in these authorities to publish documents through EMIE). Again it was difficult to learn from experience in other LEAs if the scheme adopted had developed so far that the initial problems and premises were no longer clearly recalled by participants. This suggested that for innovatory schemes it would be helpful to locate contacts who were not too far ahead in the activity. An inhibiting factor was the reluctance to put people to trouble when they had no responsibility to provide information to outside enquirers.

The absence of a strong tradition of information service provision in LEAs was likely to lead to some user resistance. EMIE would, it was argued, call for a change of philosophy and approach from people who worked in LEAs which tended to operate in isolation. *"You have got to overcome a feeling that most people have"* claimed one participant, *"that other people's experience is irrelevant ...Basically when you sit down to write a committee paper you don't go to the research because that takes two days, the time it would take to write a paper. We don't do things the rational way."* A listener immediately added, *"If you'd written a good paragraph on something I wouldn't hesitate to lift it for my report"*.

These comments were all offered in a positive spirit and appeared to reflect a sense of realism about the task ahead rather than a cynical outlook. That 'accidental' benefits might accrue was also realised:

"Sometimes finding out about other LEAs makes the enquiring LEA realise it is an example of good practice itself!"

10. CONCLUSIONS

Decisions arrived at as a result of these meetings have been outlined in the November 1982 issue of the **EMIE Newsletter**. A number of general conclusions about EMIE progress and prospects are given below:

1) it is apparent that the EMIE service has been well received in LEAs so far and that the Link-people who attended these meetings are generally well disposed towards the service;

2) a number of aspects of the EMIE role became clearer as a result of these discussions and should receive further consideration. In particular the task for EMIE in contributing to informed thinking and better decision making should be further explored;

3) the importance of existing networks has been underlined and appropriate ways for EMIE to complement and support the work of these networks must continue to receive attention;

4) the emphasis on networks and contacts as mechanisms for information seeking suggests that new entrants to the education service are at a disadvantage until they are able to establish appropriate links. EMIE may have a useful support role here and this should be examined;

5) other ways of involving LEAs more in contributing information and documentation to EMIE should be considered;

6) the task of encouraging education officers to take full advantage of the EMIE service should be pursued even if it implies some change in entrenched working habits;

7) EMIE staff and Consultants should try to find the most effective approaches to service provision between the 'extremes' of information provision and working in a more intereactive manner or as a small-scale research unit (see section 8). It is likely that approaches will vary according to the problem or issue;

8) a number of the comments made reflect differing views and expectations of the EMIE service. This variety of opinion about the type of service which should be developed raises a number of questions in relation to monitoring and evaluation of the service as well as on service development. These issues might be posed in the form of a question - What quality of service would justify continued financial support for the EMIE service?

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APPENDIX M

REPORT ON EIGHT INFORMATION WORKSHOPS ORGANISED WITH THE SOCIETY OF EDUCATION OFFICERS

Education Management Information Exchange (EMIE)

REPORT ON EIGHT INFORMATION WORKSHOPS ORGANISED WITH THE SOCIETY OF EDUCATION OFFICERS

1. INTRODUCTION

Eight one-day information workshops for education officers were organised as joint activities by regions of the Society of Education Officers and EMIE staff between November 1982 and June 1984. These workshops attracted a total of 139 participants.

The first event looked at problems in obtaining, keeping and using information in LEAs and was arranged with the Training Committee of the South East Regional Society of Education Officers. This workshop was modified to make it more suitable for less experienced officers and was then offered on three occasions as a follow-up event to the week-long residential courses for professional assistants organised by the Society. These events were staged some months after the residential courses and took the form of an active reunion day for course participants. All four of these workshops were conducted by Professor Tom Wilson of the Department of Information Studies, University of Sheffield, and the EMIE Project Head. They grew directly out of earlier training events organised as part of Project INISS.(1)

Comments made by participants at the first two workshops led to consideration being given to the construction of a case study-based workshop on information technology. Considerable interest had been expressed during the early workshops in the use of computers and other forms of information technology for administrative purposes and in broader aspects of information technology management. Accordingly, a new event was mounted as a collaborative activity between EMIE staff and Mr. Derek Foreman of the South East Regional SEO. This workshop was first held in November 1983 and was limited to the participants at the first (November 1982) workshop. After some modification the information technology workshop was offered on three further occasions, twice for SEO members in the South East and East Anglian Regions, and once for staff of Buckinghamshire and Hertfordshire LEAs. An attempt was made to propagate the idea of training workshops by inviting Regional Training Officers from other SEO Regions to attend the last of these workshops.

A publication drawing together all the course materials, trainers' notes and handouts was published by the South Eastern Regional SEO and sent to Regional Training Officers.(2) (SEO Wales is planning to use these materials in mounting a re-run of the workshop in June 1985.)

Pre-course questionnaires were distributed before five of the workshops and the results were used in modifying the workshop programmes. For the three events aimed at professional assistants, summaries of the pre-course questionnaires were used as workshop materials. A general summary of the results for these three events is included as an annexe to this report.

Course assessment questionnaires were given to participants in all the workshops; this report draws heavily upon the comments received. Response rates to the course assessment questionnaires were usually disappointing; the highest response rate achieved was 65% and the mean for all courses was 51%. Although participants at the later workshops were asked to complete questionnaires before leaving, many people left promptly in order to catch trains and few of these sent in replies.

2. REASONS FOR ATTENDING

Not surprisingly, there was some difference in the reasons offered by participants for attending the first workshop, the three reunion workshops for professional assistants and the four information technology sessions. At the first workshop all nine respondents to the assessment questionnaire mentioned an interest in information technology applications to the education field and most people wanted to share views, ideas or problems with their colleagues. Nearly all the professional assistants' course respondents referred to re-establishing relationships with course colleagues. Other aims frequently mentioned were to examine more effective ways of information handling, to learn more about the use of information technology, or to understand more about how the system works. Predictably, all the respondents from the information technology workshops said that they wanted to find out more about information technology. Frequent reference was made to learning from the experience of colleagues in other LEAs (views were mixed about the effectiveness of the workshop format for achieving this aim) and several people mentioned a specific responsibility or a development in their own LEA as a direct stimulus to attend.

3. AIMS OF THE WORKSHOPS

The four 'problem-based' workshops were designed to:

1) raise people's awareness of the information component of their work and of the necessity to get it better organised;

2) to increase the interaction between 'information specialists' and education practitioners to the point where the practitioners could recognise the prescriptions most likely to satisfy the information requirements of their work; and more generally

3. AIMS OF THE WORKSHOPS cont'd.

3) to give the 'information specialists' an opportunity to learn more about the problems encountered by education officers in doing their work.

The published aim of the information technology workshops was to provide people in educational administration with an appreciation of the principal issues associated with the appraisal and introduction of information technology for local education authority administration. These workshops were focussed on 'management awareness', embracing such aspects as industrial relations, data protection, staff familiarisation and training, as well as on broader issues relating to cost effectiveness and the production of an 'information plan'.

4. REACTIONS TO THE WORKSHOPS

After each workshop, participants were invited to comment on the extent to which their expectations in attending had been satisfied. They were then asked questions about aspects of the workshop. These responses are summarised below. Again, it is helpful to distinguish between the initial workshop, those for the professional assistants, and the information technology workshops.

5. SATISFACTION LEVELS

Respondents were asked "To what extent were your expectations satisfied?"

5.1 Initial workshop

All but two respondents expressed some satisfaction with the day as a whole; one made detailed critical comments about the structure of the day and the other wrote

> *"Not very much, but probably I was expecting too much from a one-day exercise."*

5.2 Workshops for professional assistants

Reservations were expressed by five people; three of these were only partially satisfied by the day, one would have preferred more direct teaching and one wrote

> *"I do not feel my own personal and practical problems were really touched on."*

All the other respondents found the day useful. Some comments were:

> *"I certainly did not appreciate the crucial role of information in my work. I had far too narrow a view of information."*

5.2 cont'd.

> *"The only disappointment was that there were no miracle solutions to our problems, but this hardly came as a surprise!"*
>
> *"I am pleased that I am not alone in the pressure I sometimes feel under in handling information..."*
>
> *"My perception of information communication within the LEA was at the same time confirmed, clarified and widened."*

The organiser of the previous residential courses was present as an observer at the first event and was in attendance at the other two. His comments on the first occasion as a learning experience were:

> *"Participative style, building up from pairs to whole group, was appropriate.*
>
> *Emphasis on attitude-changing rather than answer-giving, was appropriate.*
>
> *The balance of prior - actual - follow-up material was appropriate."*

He added that

> *"At £11 per head, exclusive of travelling expenses, it was good value for money."*

5.3 Information technology workshops

Most respondents were very positive in their comments. Five people were only partially satisfied, because of the size of the subject, because they were not convinced of the advantages of information technology -

> *"It is very expensive and has its drawbacks; its benefits are still less obvious"*

- or because they wanted a more advanced and detailed study. Two people were not at all satisfied. One insisted that:

> *"The course if run in 1974 or even 1969 could have had virtually the same content. The answers would have been 90% the same, only without reference to word-processors, keyboards, etc. It was largely make-believe as to what computers would in theory do, whereas the practicalities of time, cost, labour for input, plus the seemingly inevitable mediocrity of programs, render the reality very different."*

The other person did not amplify his comment but suggested elsewhere that -

> *"... the workshop was intended for people who knew what IT can do."*

He did, however, find the main case study (which took up most of the day) useful.

5.3 Information technology workshops cont'd.

More typical comments were:

> *"A very useful day with the right balance between case studies and input from course directors."*

> *"I came away having begun to think much more clearly about such issues as confidentiality, consultation, time-saving, the 'all-or-none' philosophy, etc."*

> *"I think I can say the haze is clearing albeit slowly. I gained quite a lot from discussion with participants on the course."*

6. WORKSHOP STRUCTURE AND CONTENT

Several critical comments were made about the content and structure of the initial workshop and, to a lesser extent, the first workshop for professional assistants and the first information technology workshop. In particular, the session at the initial workshop devoted to resolving problems attracted several criticisms and was described by one participant as

> *"an abysmal failure"*

because

> *"It was almost totally dominated by the course leaders and allowed little scope to the individual participants to work towards their own solution."*

Parts of the problem-based workshop were remodelled and adjustments were made to the information technology workshop programme in the light of the comments received, with apparently beneficial results.

Some of the shortcomings in the early workshops could be corrected later but occasional comments about aspects of the content and structure of workshops continued to be made. These could be summarized as requests for a little more time to be given to particular sessions (although most comments of this kind were qualified by recognition of the limitations of a one-day workshop), suggestions for follow-up workshops on particular issues, a few complaints about the content being of too high or too low level, and occasional negative comments about the group sessions taking too long to bear fruit or lacking expert participants.

Most people appeared to find the approaches adopted in the workshops more or less congenial and many positive comments were made about the usefulness of particular sessions, the 'relaxed' style of presentation, the balance of elements in the programme, and the day as a whole. Comments about specific workshop sessions are summarized below.

7. WORKSHOP SESSIONS

7.1 Initial workshop

Some comments about the 'resolving problems' session have already been recorded (section 6). This session was preceded by two others. A presentation of the education department as a communication system was seen as successful because

> *"It crystallized the major communications blackspots and encouraged introspection in terms of one's own methods and the operational procedures of the LEA."*

However, two respondents felt that too much time was spent on this session. The second session on identifying problems was thought to have worked

> *"Because problems were drawn from the group members and the thoughts were usefully summarized on the flip charts."*

Not all the comments on the 'resolving problems' session were negative.

> *"There were obviously some useful hints",*

wrote one participant,

> *"though I feel there is a limit to how much influence I can have within my own Authority in breaking down traditional attitudes and practices."*

The final session on information technology was described as

> *"A very good presentation ... ranging over the full range of telecommunication facilities available to the manager."*

Several participants asked for more time to be devoted to information technology in future, suggested restructuring the day round that theme, or asked for follow-up workshops on that topic.

Overall, the day was described as

> *"Very useful and stimulating. It certainly will be of benefit for the future. Participants were encouraged to unburden their souls which also added to the experience."*

> *"The teaching methods were appropriate,"*

said another respondent,

> *"and the day was well balanced."*

7.2 Workshops for professional assistants

The content of these three workshops was based on that of the initial workshop but was gradually modified to take account of critical comments and to provide greater task-orientation

7.2 cont'd.

in the group activities. For example, the 'problem identification' group session was changed from a free discussion of the potential issues into a consideration of four statements drawn from participants' pre-course questionnaires. Since these statements were chosen to reflect some of the concerns expressed at earlier workshops and were broadly endorsed as significant issues by workshop participants, it may be worth recording them here:

> *"I am quite certain that my colleagues in Area Offices, in Sites and Buildings and in the Advisory Service often possess information which I have to start from scratch to find. Greater use of these contacts ... continues to be hit-and-miss in a way; because our respective areas of responsibility overlap, and we none of us know all the common ground - nor do we all know what each person has specialist information about."*

> *"Where anomalies have arisen there is often only one date per year, September, from which a revised interpretation of policy and practice can take effect. The schools and/or parents concerned will often need to be notified not later than Easter, January or possibly September preceding the change. These deadlines can be missed when day to day pressures prevent the officers involved from thrashing out the matter in time."*

> *"I like to get a job done once it is started, and find it difficult at times to pick up the threads when interrupted."*

> *"It is an essential part of my work to juggle many plates in the air at any given time. It is a luxury to spend prolonged periods on one specific task to the exclusion of all others: if you do, there's an enormous backlog to clear afterwards!"*

Participants were asked to relate these situations to their own experience, to reflect on the communication implications and to consider whether they could help resolve these issues in their own LEAs. More detailed consideration was then given to these and other communication problems, leading someone to comment,

> *"In the past I have not spent anything like a morning analysing why problems in communications occur."*

Another respondent added,

> *"The trainers used the groups' own list of problems to springboard a wider scan of communication problems, which made the presentation very relevant and immediately usable."*

The sessions on resolving problems were generally well received, although attention was drawn by one person to

> *"... the sense of the ideal world that ran through this section"*

and three people thought that the presence of one or two more

7.2 cont'd.

experienced education officers in the discussion groups would have added weight to the discussions and might have provided some solutions to problems identified. Four comments made about these sessions were:

> *"The biggest problem we all seem to suffer from is luck of time..."*
>
> *"Easy solutions were not available."*
>
> *"I am now watching my in-tray for information passed on by people who do not know what to do with it!"*
>
> *"Very useful in pointing me in directions I have not previously given thought to."*

A minority of participants felt that the information technology session was too long, too short

> *"... the hors d'oeuvre and no entree"*

or inappropriate because

> *"It can only be seriously discussed when you are clear about what you wish it to do."*

Most people appeared to find this session useful; one commented:

> *"What was new to me was the concept of information technology and its use in complex forecasting and planning."*

This professional assistant cast an interesting light on his (or her) perception of that role by adding,

> *"I had previously considered this job to be a function of the manager..."*

There were a number of suggestions for additional elements in the workshops. These included discussion (or more discussion) of the "seductiveness of information", "the relationship of information to power and task", inter-relationships with other agencies and with schools, the sociology of organisations in relation to information procedure. One person drew attention to the importance of precision in articulating requirements and of training staff to think about questions they are asked, but added,

> *"I am not sure how you could tackle such questions in a day seminar."*

Interestingly, five people suggested that time should be given to the role of EMIE. A deliberate decision was taken at the outset not to feature EMIE during the workshops (although the publicity leaflets and various EMIE publications were made available) because it was felt that

7.2 cont'd.

the workshops might come to be seen merely as a 'sales pitch' for EMIE, and because discussion of problems and solutions might be inhibited by stressing the EMIE presence and hence the implicit 'official' solution to some of the problems being addressed, or might even be curtailed by providing the possibility of nominating EMIE as an easy solution to every problem.

Comments on the day as a whole were generally favourable although one person suggested that course members could have been pressurised a little more. Others commented:

> *"I thought the workshop contained a great deal that was relevant - the problem was to package it into a day's course."*
>
> *"... the day was well organised, clearly structured and gave us a clear sense of purpose."*
>
> *"The alternation of large group discussion/small group discussion/talks/coffee breaks was useful for maintaining interest and ensuring that participants remained alert."*
>
> *"A useful combination of direction from the front and groupwork in about the right proportions."*
>
> *"I feel very strongly that sessions such as these should be organised."*

7.3 Information technology workshops

The format adopted for the first of these workshops appeared to work well although minor adjustments were made to the others such as sending out more prior information and ensuring some expertize in each discussion group by inviting experts to participate or assigning people to groups. The fourth workshop, for staff of Buckinghamshire and Hertfordshire LEAs, suffered a little because participants were not assigned to discussion groups, with the result that two groups were heavily dominated by one authority and there was little opportunity to compare experience. Several participants drew attention to this lapse but others felt that they gained from establishing common ground quickly.

Each workshop consisted of a series of 'mini-case studies', followed by a main case study and a review session.

The mini-case studies "set the tone and got the group on the right wavelength" and "provided a focus for thinking out principles in a relatively simple situation which was readily understood by all". They "heightened awareness of the amount of information required before taking a decision on computerization" and "Incidentally, they threw up

7.3 cont'd.

questions regarding the efficiency of the existing provision i.e. illness, resignation of key staff."

Comments on the main case study were equally positive although one person would have preferred a more developed example, and another adjured the course organisers to

> *"Avoid case studies like teacher records which have been covered by a number of LEAs."*

This view was countered by several people, one of whom said the case study was

> *"... a live example relevant to the practitioners."*

One respondent wrote that:

> *"It focussed on an area where computerization was feasible and on a subject of direct interest to education administrators. Its subject was one in which a wide divergence of view seemed tenable - from the view that it was not worth doing to the view that it would be extremely useful. It therefore provoked lively discussion and a genuine interchange of views. As it developed, it helped participants to look critically at the job in hand and, as in the mini-studies, analyse and distinguish it quite apart from the context of new technology, an essential element in the work of the administrator."*

Another person commented that:

> *"It was sufficiently tightly focussed to be useful, but kept the focus on policy and management rather than technical detail, and this is the area that education officers ought to operate in."*

An anxiety in planning this workshop was that too much attention might have been paid by participants to the specific problems raised by the case studies rather than the general issues which these were chosen to explore. This only happened to a very limited extent, for although a few participants found the case study directly relevant -

> *"Since my responsibility is largely for teaching staff and I am currently involved in a pilot study to computerize teacher records"* -

another participant was able to comment,

> *"Provided the task in hand seems realistic, likely, relevant, then its actual content is useful even if not directly relating to one's work."*

Both the respondents quoted here found this session

> *"Very useful."*

7.3 cont'd.

In the last phase of the main case study, participants were asked to move from consideration of a teacher records system and to discuss the implementation of a pupil records system. One participant summarized the intention perfectly by observing

> *"... if you intended to merely introduce the subject and ask the right, thought-provoking questions then you achieved your aim."*

That this aim was achieved for at least some people can be gauged from the following two comments:

> *"[The discussion of pupil records systems was] not superfluous, but for me at least the case for a computer pupil record remains wholly unconvincing."*

> *"Is this [the more positive reaction to teacher records systems] merely because we accept the necessary evil as a means of getting paid, because we are used to computerized staff records or because we are both adult and voluntary members of staff?"*

The review session also attracted favourable comment

> *"Arguably the best session of the day"*

although it was suggested by a few people that there was insufficient time left to develop and explore the points raised. Several handouts were provided in advance or during the workshop and these

> *"helped to reinforce what 'flashed by' in the course of the day."*

The workshops as a whole were well received, with comments like

> *"well constructed", "first rate", "very useful exercise" and "very relevant."*

A participant added that

> *"Time was not wasted in unending introductions, etc., and the atmosphere of activity was maintained throughout. The length of individual sessions and the amount of time allowed for their evaluation was good."*

Several people asked for follow-up workshops and one suggested that

> *"If a longer course was possible, with role playing exercises to bring out the difficulties of handling vested interests, politics and obduracy, it would bring out even more of the real-life difficulties."*

8. CONCLUSIONS

8.1 Initial workshop

The organisers felt that this workshop was worth attempting but that it was less than successful because participants were not enabled to address the issues adequately. The session on resolving problems was unsuccessful and the critical comments recorded at 6 above were fully accepted. Most of the difficulty arose in the previous group discussion session when participants formed a consensus about the general nature of the problems instead of being encouraged to open out the issues, thus preparing the way for groups to work out their own solutions. Important lessons were learned about the small group behaviour of education officers and these were applied to later workshops.

8.2 Workshops for professional assistants

These events were judged by the organisers and participants to be increasingly successful thanks to an increase in the intensity of group work and some development of the information technology presentation. One general difficulty encountered in mounting this sort of workshop is that there is only limited opportunity to select themes which can be readily addressed; the group collaboration and emphasis on problems ensures that all problems in obtaining, storing and communicating information are open to consideration. Many of these problems are intractable and complex, so that anyone coming to a workshop looking for easy solutions is likely to be disappointed. Substantial experience of these sorts of workshop (including 12 workshops run for the National Institute of Social Work) has shown that success depends upon a real understanding of the way in which people use information in their work, a readiness on the part of participants and trainers to face up to the complexity of many communication problems, and, at a more mundane level, good teamwork on the part of the trainers. More than one trainer is necessary for this sort of workshop, not only to provide valuable thinking time during discussions but also to broaden the base of experience and knowledge of information services and systems available to participants.

8.3 Information technology workshops

The overall programme and general level of these workshops was established at the first event and only minor changes have been made since. It is apparent that these workshops met their main objective (see 3 above) and engendered considerable interest both in applications of information technology and in further training in this area.

8.4 General conclusions

This series of information workshops has been beneficial in several ways. EMIE staff were brought into closer contact with education officers and had a chance to learn something about the problems of being an education officer and of using

8.4 cont'd.

information in this work. Participants were, hopefully, made more generally aware of the information component in their own work and of the overall significance of information and its communication in an LEA context. EMIE was seen to be associated with a useful learning experience and became identified as a source of information in relation to the topics under review. EMIE was also able to strengthen its association with the Society of Education Officers through this form of collaboration, which should in time lead to better communication channels between EMIE and professional education officers. Involvement in training activities further provided visible evidence that EMIE is 'not just an information service' and underlined the active EMIE approach towards information exploration which is also being fostered in other ways.

It is to be hoped that other SEO Regions will follow the expected example of SEO Wales in 'transplanting' the information technology workshop (or a training activity based on this experience) in other parts of the country.

Although ample evidence is available that individual education officers can benefit from the sort of training opportunities so far provided, what is less certain is whether this kind of 'one-off' and limited individual exposure to some ideas can have any real effect on the organisations in which course participants work, even if courses are intensive. It seems likely that this work will be most effective when it coincides with a move by the organisation in the area covered by a workshop. For this reason, considerable emphasis has been placed upon information technology in all the workshops so far offered, since there are strong signs that many LEAs are considering how best to use information technology in their own administration. Almost inevitably, in considering how to make effective use of information technology, LEA staff are also looking at other aspects of their own information management. Perhaps the final justification for EMIE involvement in this sort of training is that, by considering the limitations of their information handling practices, education officers may come to see a clearer need for information on what is going on outside their own Authority and may help to create a better defined role for EMIE.

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2) FOREMAN, D., STREATFIELD, D.R. AND TAYLOR, S. Information technology workshop for education officers London:SEO 1984.

Professional Assistants in their organisations: summary of a pre-course survey of participants in three EMIE/SEO information workshops: January 1983, January and February 1984.

1. INTRODUCTION

This survey was based on a modified version of a self-completion questionnaire for managers devised by Henry Mintzberg (Harvard Business Review vol 53 (July - Aug. 75) pp. 49-61). 48 potential workshop participants completed and returned the questionnaire giving an overall response rate of 72%. The main aim of the questionnaire was to draw attention to some factors affecting communication in education departments; a brief summary of the replies is given below. It is recognised that the questions seek simple generalised responses on some matters which are experienced in a subjective way as being complex and specific or transient in character. However, it was hoped that a summary of these responses would serve as a stimulus to discussion during workshops and to reflection afterwards.

Summaries of the responses were circulated to participants before each of the workshops and some of the findings were referred to by the workshop organisers (and participants) in discussion.

2. KEEPING INFORMED

27 respondents said that they should make greater use of their contacts to get information. Eight people mentioned more time as a factor in achieving this and four people referred to the importance of building informal links. One respondent said that greater use of contacts could be achieved by ensuring that:

- *"I have connected to the networks that exist to keep officers informed."*
- *"I direct myself to those contacts who will be able to keep me informed and afford me an opportunity to gain an overview of the service."*
- *"I keep colleagues fully informed so that I am an effective member of the network."*

Another respondent was less hopeful:

> *"After 18 months of trying - I don't know!"*

3. PASSING ON INFORMATION

Respondents were asked to tick one of a series of boxes in reply to the question, "How important is it, generally, that your colleagues get your information?" Their replies were:

Very important	19	19	6	-	-	Not at all important

No response: 1

The six relatively negative respondents commented:

> *"At one time information I passed on was generally to enable a more senior officer to get a fuller picture on which to base a decision. Now I find myself passing on information about action I have taken in my own right."*

> *"They usually get the information from more than one source."*

> *"I am part of a network - info. will pass around me as well as through me."*

> *"About 60% of the matters I deal with need to be done, but if they are not dealt with are unlikely to cause problems in the short run."*

> *"Depends on the nature of the information. [Some information is important because] of any potential developments which may be referred to senior colleagues directly, when they must be in possession of all the facts."*

> *"I'm not crucial enough in the organisation to be more important! Still working my way in."*

Various general comments were made to explain why passing on information was seen as important but a few respondents pointed to more specific penalties of failing to do so, such as teachers not being paid, schools not being correctly staffed or legal prosecutions.

Eight people admitted that they kept too much information to themselves because of infrequent contact with key colleagues (two), lack of time, difficulties in striking a balance between informing colleagues and burdening them with too much detail, or uncertainty about who to inform. One respondent expressed:

> *"Impatience with the continual need to record all transactions. My job involves a lot of visits so contacts with other mobile colleagues tend to be brief."*

Withholding information was not necessarily a direct result of work pressures.

> *"I don't think that I keep too much information to myself, but I do sometimes restrict it to my Division for internal political reasons."*

noted another respondent.

4. USING INFORMATION

One problem with working in any organisation is in knowing when to act on what you know, when to wait for more information and when to actively seek it out. Nine people reported that they tended to act before information was received. They, and various other people, referred to the need to take urgent decisions sometimes without full information; one person also mentioned

> *"relatively trivial matters where inaction may carry heavier penalties than an arbitrary decision".*

On the other hand, 17 people reported that they sometimes waited so long for information that opportunities passed them by, because of inefficient information support services, 'log jams' in the system, waiting to be sure (and hoping that more information will appear), through dependence upon a large number of people to supply information, or because

> *"other people's priorities are different from mine".*

Pressure of work could again be a factor if the

> *"Original request is occasionally forgotten in the passage of time or overtaken by subsequent events!"*

5. CONTROLLING CHANGE

A question about the pace of change in the respondent's section (ie the immediate group of staff with whom the respondent worked) produced a variety of responses. The pace of change was seen as:

	replies
- too rapid	4
- occasionally too rapid, usually acceptable	16
- acceptable	6
- occasionally too slow, usually acceptable	7
- veers between too rapid and too slow	6
- too slow	2
- no change	1

Four factors were mentioned as contributing towards an acceptable or slow pace of change: cooperation and consultation; staff stability; colleagues' liking for familiar routines; and enshrined procedures. A number of reasons were offered to explain less stable environments: external demands (eg from members, MSC); rapid staff turnover; demands from more senior colleagues; last-minute decision-making by others; budgetary pressures; 'seasonal' peaks in the workload; approaching deadlines; and inadequate delegation. Such pressures can create a feeling of insecurity in new members of staff; one respondent candidly attributed part of the feeling of too rapid change to the fact that

> *"I can't learn quickly enough (at least that's how it feels)".*

Another respondent pointed to

> *"a failure to realise the relationship between speedy decision making and financial efficiency".*

6. EXTERNAL CONTACTS

None of the respondents thought that they spent too much time in maintaining external relationships although one had doubts about ad hoc rather than structural contacts, and another noted the difficulty of getting the balance right in liaising with architects, planners, etc. Only three respondents did not identify certain types of people whom they should get to know better. Most frequently mentioned of the types of people who needed 'cultivating' were:

Heads of schools

Teachers/staff of schools

Elected members

Staff of other departments of the local authority.

The long list of potential contacts included HMIs, Diocesan education representatives, college principals and staff, and colleagues in other LEAs.

7. MAKING USE OF TIME

15 respondents reported that they were systematic in their time scheduling, although they all acknowledged the need to respond to urgent matters. 10 people said they responded to the pressures of the moment. Most other respondents sought to be systematic but were generally governed by the pressures of the moment.

Most (39) of the respondents tried to achieve a mix of activities in their work and the others tended to concentrate on one particular function at a time.

Some people said that they saw it as in the nature of the job to mix activities

> *"The job is a mix of activities."*

and several replies referred to sustaining interest through variety

> *"Over-specialism would encourage a blinkered, uninspired approach to work."*

Three people saw this mixture as a means of broadening their experience and others felt that mixing the work enabled them to keep various short and long term problems in sight. One of these added:

> *"On occasions when I have deliberately concentrated on one topic/area of concern, I have invariably forgotten to undertake other important tasks."*

By contrast, the advocates of a 'one-function at a time' approach saw this as leading to more efficiency in the long term, found it hard to pick up the threads if interrupted, or attributed the patterns of work to the long-term nature of the section work-load.

25 people felt that they were more efficient with particular kinds of work at special times of the day or (occasionally) week, and seven others were unsure about this. The favoured time for report drafting and other deskwork was in the morning or late but no other clear preferences emerged in the replies. One factor at work here may be that the mornings (especially early mornings) and evenings are relatively free of interruptions.

8. WORK PATTERN

19 people admitted to being too superficial in their work at least sometimes, or were unsure about this. 18 people felt that they should attempt to decrease the amount of fragmentation and interruption in their work; seven others were uncertain about this. Various points were made in this context. The work pattern was often dictated by the need to respond to problems, people in subordinate posts sometimes had little control over their own time, and telephone calls were seen as particularly disruptive (this was mentioned by 12 people). On the positive side it was stressed that

> *"It is important to devote time to people on an ad hoc basis, as problems arise"*

and that interruptions can make the work more interesting.

17 people directed themselves towards current, short-term activities at least to some extent and, perhaps more disturbingly, only 20 people said that key problems received the attention they deserved. 15 people were uncertain about this and the remainder made more or less negative replies. As one person commented:

"The pressure of keeping up with matters which require fairly swift resolution can squeeze out problems which are less immediate but more important in the long run."

IBM

APPENDIX N

IBM United Kingdom Limited

IBM South Bank
76 Upper Ground
London SE1 9PZ
Telephone London (01) 928 1777
Telex 919039 (IBMSBK G)

Mr D Streatfield
Project Head
Education Management
Information Exchange
The Mere
Upton Park
Slough
Berks SL1 2DQ

14 June 1984

Dear David

EMIE AND THE SEO INDUSTRY COMMITTEE

Having returned to IBM, can I summarise what I have found particularly valuable in the relationship.

1. Industry Committee Newsletter. The responses from LEAs has been very positive, and this project needs to be maintained. Without the EMIE contribution to editing and publishing, it would not be possible to continue.

2. Informed briefings. The regular meetings between EMIE and myself were particularly useful in informing me of a variety of activities.

3. Reviews. The documents on the educational use of computers and the TVEI schemes were valuable sources of information to the Industry Committee. There will be a need to look at other topics.

4. Special Events. The national conference between British Library and SEO was a most successful event. The catalytic role of EMIE was an important ingredient.

In general, I found that the collaboration with EMIE considerably enhanced the effectiveness of both the Industry Liaison Officer and Committee. Indeed without EMIE's help most of these activities would not have occurred. They are also activities which need to be sustained, and then I would see a continuing role for EMIE, functioning very much as it has in the past.

Yours

Dr B W Kington
Education and Scientific
Programmes Manager

bk04ds/c5

Computers in administration

APPENDIX O

David Streatfield and **David Cracknell** examine the present and future use of micros by LEAs

What changes has information technology really brought about in educational administration? Computers and word processors are having a substantial impact on education departments at the routine administrative level and their effect is expected to grow in areas of education decision-making. This is the picture that emerges from a survey conducted in 1983 by the Education Management Information Exchange (EMIE) in collaboration with the SEO Industry Committee.

Ninety-five education authorities in England and Wales (as well as Guernsey, Jersey, the Isles of Scilly and the Isle of Man) replied to a questionnaire covering the administrative use of computers at headquarters level and in schools and further education. Questions covered the equipment used, current applications of information technology and future plans in this area. Only two LEAs reported that computers or other forms of information technology were not being used at all for administrative purposes.

Four out of every five of the LEAs reported making some use of mainframe or minicomputers for administrative purposes, but this was not the whole story. It was revealing that almost two thirds of the Authorities were using word processors, sometimes as part of a corporate resource, and over half kept one or more microcomputers for use by education administrators.

Eighty per cent of the LEAs reported that computers (usually microcomputers) were being used in at least some of their schools to help in administration. This is almost certainly an underestimate: some respondents admitted that they did not know to what extent microcomputers were being used in this way. Their uncertainty can be partially accounted for by the fact that most of the respondents were education officers based at headquarters and not necessarily well placed to report in detail on schools' activity unless it was centrally organised.

At least one important issue is raised by the apparent uncertainty about what is going on with computers in schools administration. Clearly it is relatively easy for a numerate and experienced teacher to use spare capacity on the school micro to produce various kinds of lists or to perform other routine adminisrative and clerical tasks. These activities are difficult to monitor at LEA level even if there is a wish to do so, given that most microcomputers are provided in schools for educational purposes.

Lack of involvement by the local authority may, however, lead to much local effort being wasted because it is based on insufficient expertise trying to utilise insufficiently powerful equipment. It may be seen as disturbing that the administrative potential of these increasingly common items of school equipment is being developed in a more or less haphazard way. Software houses have identified a profitable new market and are beginning to offer schools administration packages but the response to this survey gives little evidence of coordinated specification by LEAs of administrative requirements at school level. This lack of cohesion in many LEAs is confirmed in a more detailed study of administrative computing in schools now being carried out under the supervision of David Lancaster at Sheffield City Polytechnic. Without a more concerted approach to specification of requirements by LEAs, schools are left at the mercy of software salesmen. The importance of the role of LEA officers and advisers in giving a sense of direction to the use of computers in school-based administration was reinforced by research at Bristol University reported by Simon Pratt in *Educational Administration* (February 1983).

Earlier studies by LAMSAC and other bodies pointed to a 'first generation' of local government interest in information technology centred upon financial administration and the accumulation of small amounts of data about large numbers of 'cases'. These reports predicted a variety of other applications being adopted in the immediate future and the new uses are beginning to emerge. There is ample evidence in the EMIE/SEO survey of interest not only in 'traditional' applications, but in computerized 'people-record' systems. Some LEAs are also beginning to look at the possibilities of using computers in support of decision-making.

Looking first at the current applications which were reported, mainframe computers are being used mainly to organise information across an education authority. The most common applications are still essentially financial administration systems (e.g. salaries, sick pay, allowances) or have a large financial component (further education awards). Many of these applications could be regarded as 'local authority' rather than 'educational' in scope and the computers which are used are often located outside the education department. The picture here is not static though; several LEAs reported that they were taking another look at some current applications, with the aim of enhancing or replacing existing systems, notably for school meals and catering and for FE awards. The effort which will be needed to enhance existing systems will undoubtedly increase and this may restrict future resources for the development of new applications.

Turning to the uses being made of microcomputers it is clear that LEAs are beginning to appreciate the possibilities presented by easy local access to hardware, especially if this is linked to a mainframe computer elsewhere. Eight of the 10 most frequently cited microcomputer applications were directly concerned with some aspect of schools administration, such as timetabling, curriculum analysis or school roll returns. It

programs become available an increasing number of tasks will be performed routinely on microcomputers and this may have the effect of decentralising some aspects of the completion of routine records. Careful consideration will have to be given to the staffing and other implications of such changes.

When future plans of respondents are examined, an interesting shift is apparent, away from preoccupation with financial accounting and towards more sophisticated records relating to pupils, students and staff. This shift in emphasis has been accompanied by an interesting and surprisingly rapid change in attitude on the part of many local government staff towards the new technology. As recently as two years ago it was commonplace to encounter hostility and suspicion towards the administrative use of computers in local government. Recent information technology workshops for education officers (organised by EMIE with the SEO) have shown both an increased willingness to consider the possibilities offered by computerisation and a well-informed concern about potential pitfalls, including those arising from the confidentiality of information.

A longer term trend towards computerisation as an aid to decision-making could be detected in the comments made by respondents to the EMIE/SEO survey. Early approaches to computerisation tended to rely heavily on staff savings as a major justification for expenditure. It would be interesting to discover how far LEAs have been able to effect real staff economies as a direct result of computerisation. Computerised decision support systems offer more potential in terms of effective staff management because savings in staff time will be for 'expensive' managerial staff rather than 'cheaper' administrative and clerical staff. It is also arguable that staff time should not be costed at a constant level, but rather that managerial time is most valuable when decisions are required. It remains to be seen whether new decision-support systems really will support decision-making or make decisions more difficult by providing too much apparently relevant information.

All of the information provided in response to the questionnaire has been stored at EMIE and can be called upon by any LEA education officer or adviser through the EMIE enquiry service. A short report on the survey has been published by EMIE and is available free to LEAs. Other interested individuals or organisations can obtain a copy of the report for £2 including postage (cheques should be made payable to the National Foundation for Educational Research) from EMIE, NFER, The Mere, Upton Park, Slough, Berks SL1 2DQ.

(David Streatfield is the EMIE project head; David Cracknell is the secretary of the SEO

LOCAL EDUCATION AUTHORITIES RESEARCH GROUP

Aims of the Group

The LEA Research Group is a self-help organisation for education officers, administrators and advisers involved in research, development, planning or statistics work within Local Education Authorities. Several tasks were suggested for the Group when the idea was proposed early in 1983. These were:

- to provide a forum for discussion of the role of research and the management of research in LEAs;
- to put staff working on research, planning, analysis or computing in touch with their opposite numbers in other LEAs;
- to exchange factual information;
- to test ideas;
- to provide a forum for the discussion of current educational research issues;
- to compile a directory of resources;
- to organize seminars and publish a journal.

These tasks will be reconsidered when the initial programme of activities (outlined below) has been completed.

Background

A leaflet was circulated in February to all LEAs in England and Wales by the Education Management Information Exchange (EMIE). The aim was to assess the extent of interest in such a Group and the level of support. Fifty five people from forty three LEAs expressed interest in the Group and twenty eight people offered to help in setting it up. A preliminary meeting was arranged at short notice in July 1983 and was attended by fifteen people.

Participants at the preliminary meeting appointed a small planning group to initiate a programme of work. Since a number of interested people were unable to attend the preliminary meeting it was decided that the Group should be formally constituted with a representative committee and terms of reference after the initial cycle of day workshops and a questionnaire survey of research in LEAs had been organised.

Cont'd

Planning group

Planning group members are:

F.Gale (Somerset), Miss M.Goodman (Harrow), Miss M.Henshaw (Coventry), Dr.P.Mortimore (ILEA), Ms.H.Pennell (ILEA), A.Seaward (Isle of Wight - Acting Treasurer), L.South (Humberside), D.Streatfield (EMIE - chair), Ms.S.Thompson (EMIE) and R.Vincent (Tameside)

Initial programme

The workshop programme has commenced with a session on classification of impairment in relation to the 1981 Education Act, on December 9th 1983 in London, and a day in Coventry on March 23rd 1984, devoted to forecasting pupil numbers. A further workshop on monitoring equal opportunity is to be arranged for the Summer term in 1984.

Questionnaires have been sent to all LEAs in England and Wales to find out about current and recent research-related activities with the aim of compiling a directory of LEA research.

A general meeting will be called in the first half of 1984 to receive a report on the survey and to decide about the future structure and programme of the Group. A policy on relationships with other groups interested in the field will also be considered at that stage. Meanwhile it should be stressed that the LEA Research Group is concerned with immediate practical issues relating to in-house research and the aims of the Group should not conflict with those of other agencies.

Further information

If you would like further information about the Group or to become involved please contact David Streatfield or Sue Thompson at EMIE, NFER, The Mere, Upton Park, Slough, Berkshire SL1 2DQ. Tel. Slough 23156.

VISIT BY THE PROJECT LEADER TO THE USA AND CANADA

(Report to the Project Steering Committee, November 1981)

Education Management Information Exchange: report by the Project Head on his visit to the United States of America and Canada: November 1981.

1. INTRODUCTION

This study tour was carried out from November 5th to 19th and involved visits to Washington D.C., Philadelphia, King of Prussia, Toronto and New York City. The aims of the tour were:

1) to explore the overall financing methods used by information services in education and other relevant fields;

2) to investigate pricing methods for specific information services applied in education and other relevant fields;

3) to find out about innovative information services of potential relevance to the EMIE Project. A more general subordinate aim was to introduce the Project Head to North American educational systems and services.

The information gleaned from each visit is summarised briefly below in section 2. The main points which emerged in relation to the three stated objectives are outlined in section 3. A single recommendation about future consideration of charging policy options is made in section 4.

Two appendices have been prepared:

A. A list of significant publications supplied by organisations in North America.

B. Publicity material describing eight information services.

These appendices will be supplied on request.

2. ORGANISATIONS CONTACTED

2.1 American Association of Colleges of Teacher Education, Washington D.C.

Brief discussion with Dave Imig (Executive Director). AACTE also provides the base for the ERIC Clearinghouse on Teacher Education.

2.2 Association of Research Libraries, Washington D.C.

Saw Susan Echelman (Director). Association consists of 113 of the largest research libraries in USA. Houses the Office of Management Studies (q.v.)

2.3 Canadian Education Association, Toronto. (Also appendix B)

Discussion with Diane Sibbett (Librarian).

School Boards pay a fee calculated at 5 cents per pupil (minimum fee of $200) for which they receive multiple copies of special reports on topics of concern, *Education Canada* and the CEA *Newsletter* and other facilities including an enquiry service. The information services are currently under review (see Woods Gordon Management Consultants in appendix A).

2.4 Central ERIC (Office of Dissemination and Resources), Washington D.C.

Met Bob Chesley (ERIC Coordinator).

Described the ERIC system of 16 decentralised clearinghouses appointed through competitive contracts. Their task is to obtain, select, index and abstract publications and documents in their fields. The vast majority of use of the system is made at the work sites of subscribers to the microfiche (hence local rather than national expense). The main missions of ERIC are:

1) to gain bibliographical control over fugitive literature and journal literature;

2) carrying out information analysis for users;

3) provision of workshops and training courses for users.

c.700 libraries subscribe to all ERIC publications and services (thus making source documents readily available). 56 of these are in Australia and Canada, nearly all the remainder are in USA. There is only one full subscriber in the UK - the British Library Lending Division. 300,000 computer searches were conducted using ERIC in 1980.

Discussed an experimental project aimed at creating Education Practice Files. Approximately one third of ERIC records relate to classroom and administrative practices. NIE funded a feasability study in which a sample file was set up, primarily for referral purposes. Serious problems were encountered - it proved difficult to obtain information about who was doing what and over 50% of referrals resulted in failure to make contact. ERIC is still interested in providing a service focussed on practice but has encountered serious budget problems. Meanwhile BRS Online Retrieval System (the contracter for the feasability study) has set up an experimental commercial network called the School Practice Information Network. (Details not yet received).

2.5 Council of Chief State School Officers, Washington D.C.

Met George Rush (Director, National Center for Education Statistics Data Project), Jack Bluestein (Director of International Education) and briefly Bill Pierce (Executive Director). Subsequently had a lengthy telephone conversation with Patrick Martin (Director, Dissemination Management Project).

CCSSO consists of the 57 State Education Chiefs (and equivalents) who meet twice yearly and have limited capacity to develop coordinated policies. Information sharing on information policy issues is ad hoc and regional. (CCSSO staff several times suggested that they would like to set up an EMIE-style service). An attempt has been made to share knowledge about computer applications through the directory published by the National Center for Education Statistics (see appendix A).

A voluntary approach has been taken to achieving comparability in the management of statistics through a 'common core of data' orchestrated by a series of directories defining the scope of terms. Some States (a few) have a computer-based system.

There is no national network for policy information (inter-State) and there is even more of a problem locally in getting practice information. Approaches have included regional collaboration activities, development of local information centres (two of these are described below) and promotion of the National Diffusion Network (see below).

An annual membership-needs survey is conducted by questionnaire.

2.6 Drexel University Library, Philadelphia.

Met Tim LaBorie (Librarian, School of Librarianship). Discussed some problems of studying the users of information services.

2.7 Educational Research Service, Inc., Arlington, Virginia.

Telephone coversation with James Kirkpatrick (Senior Associate Executive Director.)

Grew out of Educational Research Association as a service bureau for educational associations (such as the CCSEO) and States. (Details of services not yet received).

2.8 ERIC Clearinghouse on Higher Education, Washington D.C.

Met Jonathan Fife (Director). Now employs 6.6 F.T.E. staff (following 'the Reagan cuts').

Two categories of users:

- students (regarded as future users): charged for computer searches at the rate of $15 for up to 100 'hits' (this is slightly below the economic rate);

- other users: charged for computer searches at the rate of $35 for up to 100 'hits', then 15 c. per 'hit'.

The service uses the Lockheed (intermediate agency) system for access to ERIC tapes.

The present search approach uses the T1700 through Telemet (dial telephone) to California. Searches are conducted at off-peak periods and the result supplied within 24 hours.

A new service has just been introduced (in the week of the visit). Based on the present system, this uses a Vector Memorite III word processor to communicate. Items are selected from the original search and a bibliography is compiled by calling up numbers in order. The data are then reformatted and printed or duplicated at high (and saleable) quality.

The second new service is an inventory of Higher Education Research which will be published and sold in directory form. The criteria for inclusion are that the research should be current (or not more than one year old), a final report should be available or the research director should be willing to talk to enquirers or the researchers should be willing to make the research data available. This directory is intended to link practitioners and researchers. From the point of view of practitioners, ready telephone contact is seen as fitting their normal information seeking behaviour. For the researchers the potential benefits include consultancy work and possible 'test beds' for future research. The first two criteria are intended to prevent 'territorial stake-outs' of research themes which researchers intend or would like to pursue.

2.9 ERIC Clearinghouse on Urban Education, New York.

Met Erwin Flaxman (Director and Associate Director, Institute for Urban and Minority Education). A very detailed discussion took place about the features and weaknesses of the ERIC system. Attention turned to the inequity of information; dissemination is a function of the Federal Government (unlike UK) but provision is nominal. ERIC could be viewed as a means of making information widely available through institutions of Higher Education, RISE centres and university libraries but,

1) the dissemination model adopted was based on the science and technology model - overestimating the need for documents and printed information;

2) ERIC sought to be all things to all people - researchers, politicians, teachers, students;

3) the idea was to create State access to information. This has not worked well because of miscalculations about how information moves locally and what information services are needed.

Flaxman's approach has been to organise the urban school district as the basic unit and to focus upon the information requirements of teachers and administrators. This approach revealed that ERIC contains few reports by schools on their own activities because there is no incentive to prepare them and, even if prepared, they are difficult to locate in the schools system. He has obtained special funds to enable him to work in an educational system (Chicago) developing a comprehensive approach to information involving every staff group (including various administrative levels). This will involve:

1) seeking basic information on their problems;

2) small group interaction: articulation of problems in information-related terms;

3) seeking strategies for coping;

4) introducing participants to the existing range of resources;

5) step by-step information handling exercises;

6) information consultancy.

The overall aim is to identify the information needed to strengthen the ERIC database and help schools get the information they require.

Referring to the National Diffusion Network (q.v.) Flaxman pointed to the main weaknesses;

1) there is insuffficient description of the innovations;

2) there is a mass production approach. The implications of local adoption are not stressed;

3) there is not enough help available from initial protagonists.

Most adoptions are fairly local (geographically); the significance of key staff in each adoption is insufficiently stressed (especially the consequences of their leaving).

Discussed the problems of bringing about change and referred to the work of the Rand Corporation (1) which is examining Federal dissemination policies, and the National Academy of Science study of post performance evaluation of research.

2.10 Intergovernmental Committee on Urban and Regional Research, Toronto. (Also appendix B)

Met Tanya Wanio (Information Coordinator) and Alida Flinn (Deputy Director).

ICURR has 13 staff: 4 are information officers (including the Executive Director) who provide reference services and contact names as well as spending 9 weeks per year in visiting provincial and municipal planning offices;

> 4 are documentalists, who provide a library service scan periodicals and booklists, and enter documents on the computer data base;
>
> 1 is an editor, who produces a bi-monthly bulletin, *Interaction* and prepares 16 cards per month (representing c.10% of the most important documents received) for distribution to members. Only items which are readily available through the system are 'trawled' in this way.

Over the past two years ICURR has undertaken much more work with municipalities (they had previously concentrated on provincial and federal work). Municipality subscriptions only cover the mailing cost of the service supplied.

The service relies heavily on contact visits. Following a recent review it has been agreed that these should continue (even though ICURR has budget problems) because of the high quality of information obtained. Since visits to municipalities were stepped up the quantity of valuable information obtained from this source has increased dramatically.

Telephone contacts have recently been introduced to supplement a cycle of alternate year visits. These calls take about 15 minutes, compared with the average of 1 hour for a contact visit ("*Much more detailed information can be gleaned from the visits*"). Recent trends are detected largely through these visits "*You can forsee about six months down the* *live*". Currently these include municipal administration, energy, and resource management. Visits are also useful to detect problems through repetition of concerns voiced at successive visits.

The turnaround time for response to requests varies between 2 days and 2 weeks on average. The typical response involves supplying a bibliography and a letter giving the names of possible contacts.

ICURR is a closed system for administrators only (to the chagrin of academics). Exchange agreements for publications operate with some Universities but do not extend to the document material (although individual academics on contract to local government can use the service for a limited period).

The data base is alpha-numeric. Each topic area and subject area has its own code. All worthwhile documents received are coded (file of approx. 7,000 documents). Occasional scope notes are included. The file is culled annually and most of the material is less than three years old.

During contact visits the staff ask about research-in-progress but not yet completed. This information is updated on the next visit and an occasional general mailing asks for current information on these projects. These work-in-progress records are entered in the same file sequence as the documents.

ICURR is moving towards a keyword approach because of the problem of continuity in coding when staff leave.

A directory is published (see appendix A) and sold to non-members at a cost of $50. Document loans are made for a nominal period of one month. If items consist of less than 20 pages they are photocopied and sent to members free. This policy is under review; in future enquirers may be charged on a per page basis or short length documents may be bound in hard covers and lent.

Seminars are organised on significant themes (not more than two per year). These usually attract 30-35 people; the present format seeks representatives from all Provinces. Courses are run on a cost-recovery basis and last one/two days. Seminar proceedings are sold at the rate of 20 cents per page. One side-effect of the seminars is to enable ICURR staff to "*gain a little more depth of knowledge*" through organising and participating.

50% of the ICURR funding in 1981-2 came from the Federal Government with the other 50% supplied by the Provincial Governments on a per capita basis to a total of $459,600. A further $15,000 was provided by municipal subscriptions. Charges for information searches (to non-members) and photocopying (when a charge is passed on from another agency) amount to $2,000. 40% of the budget goes on salaries and 10% on computer services. (The storage costs of the system are defrayed through an 'arrangement' with the Federal Government computer service - the true computer costs would be double the amount paid).

2.11 International City Management Association, Washington D.C. (Also appendix B)

Met Jay Muzychenko (Assistant Director). ICMA provides a range of information services to members. Association membership is based on population size: 5,000 population = $150; 250,000 = $685.

Special reports for wide circulation (see appendix B) are usually generated as part of a Federal Government contract. *The guide to management improvement* *projects in local government* is published quarterly and offered on a separate subscription at $35 pa.(Inclusion in this publication is seen as an accolade by ambitious city administrators). Other services are available to non-members and are individually priced.

The profile of requests received can sometimes be used to dissuade members who are considering resignation.

2.12 National Association of State Boards of Education, Washington D.C.

Telephone conversation with Kathy Williams. NASBE represents the lay members of Boards of Education. No formal information service provided although ad hoc enquiries are fielded.

2.13 National Diffusion Network, Washington D.C. (Also appendix B)

Met Lee Wickline (Federal Director). The service is designed to pick up local educational innovations (programmes) and, when appropriate, encourage replication.

NDN differs from other dissemiantion systems in that:

1) face-to-face interaction between programme developers and potential users is encouraged;

2) value judgements are made about what should be disseminated. The service is aimed at college or school teachers and allows them to choose from amongst a set of effective programmes. There is a rigorous evaluation process at the point of initial programme selection, and evaluation data are submitted with the proposal to the Joint Dissemination Review Panel.

If a programme is selected it becomes eligible for dissemination through the NDN network. 84 programmes were funded for dissemination in 1980. Money is available for:

1) refining material for use elsewhere;

2) training courses to help install and operate programmes (once a commitment is made to install a programme);

3) awareness sessions at which several related programmes are introduced to a group of potential users.

In 1980 the average progamme was installed in 92 schools; almost 10,000 schools have adopted programmes since 1974. Sometimes there is a time lag before take up; there are also horizontal adoptions (i.e. not directly stimulated by NDN).

A group of State Facilitators (one per state) make information available about the network; selling NDN rather than specific programmes. They identify school districts/States interested in specific programmes ("*screening out the window shoppers*"). The overall aim is to provide inter-State transfer of programmes.

NDN was launched in 1974 and its strategies are drawn from various fields - "*networking strategies are powerful because they provide a sense of ownership. Participants draw psychological support from the sense of building on successes*"). If a programme fails it is dropped from the service (*"the word gets around"*). Evaluation is difficult because the people who try out the programmes are developers not observers. Adoptions are funded at a very low level and there is no money available to support evaluation so this depends upon school district resources. NDN advises evaluation in second and third year (adoptions are for three years) by which time the programme should be routinized (20 programmes were using the NDN evaluation model in 1980). 23% of adoptions fall by the wayside.

[Note by DRS: an interesting Network with obvious lessons for EMIE but the lack of attention to local evaluation when programmes are adopted is a serious weakness].

2.14 National Institute of Education, Washington D.C.

Met Charles Missar (Librarian).

Outlined NIE services and the related activities of the Central ERIC service and National Diffusion Network (q.q.v.). Described other services based on ERIC such as RISE, Pennsylvania (q.v.) and the San Mateo Educational Resources Center, which began providing services to that county, then on a contractual basis to the state (California), now also to Arizona, Alaska, Massachussets. (Details of SMERC services not yet received). Discussed the difficult political relationship between NIE and the Department of Education, which is under threat from the current administration.

Described the Educational Reference Center services provided for staff of NIE and Federal Government staff. These services are described in the *Information Services Manual* (see appendix A).

2.15 Office of Management Studies, Washington D.C.

Met Duane Webster (Director). OMS offers consultancy, assisted self-study programmes and training for library managers and staff. Discussed approaches to practitioner training with an information handling component. 1979-1980 budget was $455,000 of which 47% went in salaries (5 staff) and 15% in travel. 50% of the income was obtained from Foundations, 20% from membership fees and 30% through cost recovery charges.

A Systems and Procedures Exchange Center offers a clearinghouse of documents on current management and operational practices based on the *SPEC Flyer* bulletin. (See appendix B).

2.16 Ontario Education Resources Information System, Toronto.

Met Marjorie Mercer (Co-ordinator).

Onteris consists of an information service based on three computerised data bases:

ARCH - 2,600 records of Ministry-funded commissions, reviews and projects;
CURR - 3,000 records of curriculum guidelines and support documents;
EDUC - 1,800 records of educational research documents based on ISIS package.

Free text or thesaurus searching is possible for all three files. Publishes an annual subject index to EDUC using Precis.

For CURR, contacts in 6 regional offices were used to collect local documents, this was a slow and 'political' collection process - success depended on the individuals.

Staff of Onteris are processors, not collectors of information. They now use a combination of promotion (at conferences etc.), telephone and letter to obtain material. Telephone is used systematicaly as a contact method.

ARCH is drawn upon by the current Special Education Review Project. Onteris is servicing the committee with background documents (aimed at providing directions not answers). Indexing is through contextual indexing strings using phrases to connect terms.

'In progress' records are maintained for ARCH and CURR and incorporated in the main files.

Now developing:the Education Communications Network of Ontario (a hard data service). Experimental activity involving 8 online users carrying out c.100 searches per month.

An 'issues' data base is being created to serve the Strategic Planning Task Group which is "crystal balling".

2.17 Research Information Service for Education, King of Prussia, Pennsylvania. (Also appendix B).

Met Richard Brickley (Director) and Carolyn Trohoski (NDN State Facilitator). RISE offers services to the whole of Pennsylvania except Philadelphia and Pittsburg, (potentially 130,000 teachers) serving the counties through 29 Intermediate Units. (It grew out of a service offered to only two counties). 9 staff are employed, mostly former teachers. About half of the 15,000 requests received in 1980 were from classroom teachers, the remainder come from administrators.

A typical search involves provision of 30 citations and up to 120 pages of material and could cover up to five data bases (including ERIC). The results of c.1000 searches are held on file; these are deleted after four years. After the initial search on a theme, subsequent clients receive the bibliography (not normally updated) and may ask for up to 15 of the documents cited. Outside users are charged $20 for up to 20 documents. The service is computer-based. A customised search of the literature cost $25 per hour plus retrieval costs (minimum of $150) or specific charges are made for data base searches (e.g. ERIC, 25 citations = $22.50).

Funding of the service is in the ratio: Federal contribution 75%; State 20%; fees and charges 5%.

Local application of the NDN programmes was then discussed. RISE has been involved with NDN since its inception and became the Pennsylvania link through a competitive grant. RISE is concerned with local evaluation. Their approach is based upon:

1) recognition that change is a process not an event;

2) fidelity of the adoption (ensuring that the innovation has been adequately introduced);

3) impact evaluation.

The state has made $160,000 available for evaluation, travel and training (1½ people are employed). There is a small technical assistance fund to 'grease the wheels'.

Since the NDN tends to require group adoption by a school, RISE sought to encourage small-scale local classroom innovations through mini-grants. They tried to share this knowledge by compiling a directory of innovations but this had little impact; a 'fair' was held (trade exhibition style) and this worked in a limited way.

The American Association of School Business Officials had identified about 20 administrative projects using an NDN style dissemination model. However, most of these were seen as peripheral users. (Details not yet received).

Three significant discussion points:

1) involvement with NDN came through recognition that "*search information services must be married to other programs*";

2) "*success in an information service depends on serving each individual well with what he wants first time rather than what the organisation wants. This gets across the message that the service is quick and relevant*". For this reason RISE helps individuals with their own research/course work;

3) Brickley rejects current concern about information services being 'marginal' to the organisational goals and functions. He argues that they should be marginal and thus more readily responsive to the needs of people bound up in the organisation.

2.18 Research Information Service for Education, Toronto (Also appendix B)

Telephone conversation with Brenda Rolfe (Librarian).

RISE is based at an Institute for Studies in Education Library. Their basic charges for information searches are $25 per hour, plus the direct cost of any computer search.

2.19 University of Maryland, College of Library and Information Services, Maryland.

Met Michael Reynolds (Acting Dean) and various members of his staff. Discussed the EMIE Project and various North American initiatives in information service provision. Described the Teachers' Centers Exchange based at the Far West Laboratory for Educational Research and Development, San Francisco. (Details of their services not yet received). TCE publishes a Directory of teachers' centers in touch with the Exchange.

3. CONCLUSIONS

3.1 Methods of financing information services

The idea that information is a saleable commodity is much more strongly established in North America than in Europe. This statement is, however, somewhat misleading. Specialist information agencies in the USA and Canada are usually:

- small firms offering expertize in creating and operating data bases;
- even smaller firms (sometimes one person buying access to various data bases through an agency) offering to conduct information searches in specialized areas; or
- agencies selling access to their data bases(2).

None of the information agencies visited or discussed during the recent tour had even approached self-sufficiency through charges made for information services. All the information agencies operating in the education field depended heavily upon Federal or State grant aid (2.4, 2.10, 2.13, 2.17) or research contracts (2.11). Subscription income was usually derived from local government authorities on a per capita basis (2.10, 2.17) or indirectly through membership of the parent association (2.3, 2.11).

3.2 Charging for specific services

Some information agencies derived up to 20% of their income by conducting information searches. Since the computer search time was invariably the largest component in such a charge and this was usually substantial, (e.g. $25 per hour plus direct computer costs (2.18)), there was little scope for doing more than recovering costs by this method. (2.8, 2.17, 2.18)

Other areas in which cost recovery programmes had been adopted were in publishing products of the service (2.10, 2.11) and in providing training courses for service users (2.10, 2.15). The pattern of enquiries might itself serve as a guide to likely course topics (2.10). Examples were also reported of charges being made to recover mailing (2.10, 2.17) or photocopying costs (2.10) or to pass on charges levied by other information agencies in the course of an enquiry (2.10). Co-sponsorship of services with one or more other agencies was another topic discussed but experience of this approach was confined to the organisation of training courses (2.10).

Three points which received some support at various discussions were:

1) the necessity to make some sort of charge to users from the outset so that they do not become accustomed to a totally free service. (This approach was particularly urged by Jonathan Fife: see 2.8 above);

2) the impossibility of charging for providing contacts unless these are either offered in a directory (2.5, 2.8, 2.19) or 'dressed up in an elegant letter';

3) the need to spend money on presentation in order to make money.

On the basis of the discussions and visits it seems likely that EMIE publications and training activities could be developed to a point at which they become self-financing. If imaginative ways can be found to make use of the consultants' time then some of these activities may become profitable. There seems little immediate prospect of making the basic enquiry and contact services financially viable through direct charges.

3.3 Information service ideas

Typically the information services visited were providing an enquiry service based upon their own collection of materials, sometimes supplemented by the ERIC service. They produced newsletters, reports and other publications for members, some of which were also on general sale. An example of what can be achieved with a fully coordinated service tailor-made to the needs of their clientele, was provided by the Intergovernmental Committee on Urban and Regional Research (2.10) which is primarily an information service. ICURR places heavy emphasis on contact visits as a means of improving communication, obtaining up-to-date information and monitoring emerging problems and likely trends. The results of their experiment with telephone contacts to supplement the visits will be of considerable interest and should amplify the experience of Onteris (2.16) which uses the telephone as the main contact method. ICURR experience with training courses suggests that they are valuable as a means of responding to a profusion of related enquiries, exploring significant issues, raising people's awareness of the significance of information in their work and, potentially, improving their information handling skills.

An assumption that "search information services must be married to other programs" led RISE, Pennsylvania (2.17) to become heavily involved with the National Diffusion Network. This argument has been implicitly recognised in the present EMIE programme, which goes considerably beyond search service provision. Deeper involvement in the educational concerns of LEA administrators through training courses and representation at conferences is likely to be beneficial.

The National Diffusion Network (2.13) itself provides an interesting model for the dissemination of ideas, emphasising, as it does, local involvement both in generating innovations and replicating them. It was interesting to note that all four of the people with whom I discussed NDN tended to regard it to some extent as their own project. This degree of identification may indicate the strength of the networking approach adopted, and there may be lessons for EMIE here, perhaps in terms of encouraging a broader regional role for LEA Link people. Further involvement at regional level with the Society of Education Officers might also be fruitful.

A number of specific ideas were picked up, some of which may be translated into EMIE service proposals in due course. For example, it was interesting to see the approach taken to 'research in progress' by the ICURR and Onteris services and the publication of directories specifically aimed at drawing attention to parallel work and potential contacts elsewhere (2.5) was also worthy of note. At a different level it was valuable to explore the possibility of linking a conventional bibliographical data base searching operation with a word processing facility (2.8) and at the other extreme it will be useful to see how Flaxman's work with the Chicago schools develops. (2.9)

4. RECOMMENDATION

It is recommended that the findings from this tour, together with other information about methods of funding information services, should form the basis of a discussion paper to be prepared for a later meeting of this Steering Committee. The aim of this paper should be to examine possible approaches to the future funding of the EMIE service.

REFERENCES

1) See for example: Berman, P. and others. Federal programs supporting educational change. Vol VII: Factors affecting implementation and and continuation. Santa Monica, Calif. Rand Corp. 1977.

2) Maranjian, L. and Boss, R.W. Fee-based information services. New York: Bowker 1980.

DRS
November 1981

APPENDIX R

EDUCATION MANAGEMENT INFORMATION EXCHANGE

EMIE

Sponsored by:
Department of [illegible]
National [illegible]
Society of [illegible]
Welsh Office

EDUCATION MANAGEMENT INFORMATION EXCHANGE

EMIE is a new range of information services aimed at Education Officers and Advisers of Local Education Authorities. The main aim is to help LEA staff exchange information about education policy issues and useful practice.

EMIE can help by:

- **putting you in touch with other people** who have experience of your current problem. They may have worked out a solution, tried out an approach, or looked closely at the issues involved;
- **collecting together policy documents** from LEAs and other sources. EMIE is based on a small, carefully selected collection of up to date information;
- **answering your enquiries** on education policy and practice;
- **making information available** on a range of important educational issues. Publications are issued as the need arises. They include summaries of significant documents received, news about initiatives in the field and commentaries on current problems prepared by Consultants;
- **telling you about developments when they occur.** If you have a special interest, EMIE can keep you informed about significant changes.

How you can help

EMIE is a cooperative enterprise which can only work with the support of LEA staff. Each LEA has been asked to nominate a Link-person to act as a point of contact within the LEA and as a channel of communication. Link-people seek out documents for EMIE and pass on news about interesting innovations and emerging problems.

If you are doing work which you think may interest your colleagues in other LEAs please contact your Link-person.

Contributing Documents

The service handles all types of documents including 'sensitive' material. Documents sent to EMIE can be:

1. open to all enquirers interested in education policy issues, or
2. available only to professional officers of LEAs, or
3. for use by EMIE staff and team of Consultants only.

If you put a restriction on access to any document it will not be made available to anyone else without your express permission (this will be sought via your Link-person). It is best to send documents through your Link-person.

How to use EMIE

The enquiry services are free to LEA users. Simply contact the EMIE staff by telephone or in writing. They will search the document collection and other information sources, seek out information, provide named contacts and involve specialist Consultants as required.

The Scope of the Service

EMIE is concentrating on seven broad subject themes which are reviewed as the service develops. These themes are:

* Falling school rolls and the management of contraction.
* Transition from school to adult life.
* The Education Act 1980.
* Assessment of performance.
* Induction and in-service training of teachers.
* Special education, including the Education Act 1981.
* Computers, especially administrative uses.

The Sponsors

EMIE is a four-year research project launched in January 1981. This project is sponsored jointly by the Department of Education and Science, the National Foundation for Educational Research in England and Wales, the Society of Education Officers and the Welsh Office. Following an experimental phase the services were opened nationally in April 1982.

Special Features

Two features of EMIE are aimed at ensuring a ready response to enquiries and an element of 'quality control' over the information being handled:

a computerised data base, using the IBM Stairs package, has been built up so that EMIE staff can retrieve information more readily.

a team of Consultants is employed to help deal with difficult enquiries, advise about the content of documents and provide reviews or summaries of information on topics of current importance. The five Consultants are:

* Fred Adams, formerly Director of Education, South Glamorgan.
* John Hudson, formerly Deputy Under Secretary of State at the DES.
* (from January 1984) Michael Johnson, Director of Education, Harrow.
* Brian Kay, formerly Chief Inspector, HMI.
* Margaret Sproat, formerly Director of Education, Gateshead.

The Principal Adviser to the EMIE Project is George Cooke, General Secretary, Society of Education Officers.

To use the EMIE Service

Please contact David Streatfield (Project Head) or Sue Thompson (Senior Research Officer), EMIE Project, National Foundation for Educational Research, The Mere, Upton Park, Slough, Berkshire SL1 2DQ. Telephone 0753 23156.

This information was published in October 1983 and is current until December 1984.

APPENDIX S

EMIE NEWSLETTER

EMIE newsletter
EDUCATION MANAGEMENT INFORMATION EXCHANGE

No. 5 August 1984

The eight months since the last Newsletter have seen an increase in the number of enquiries received by EMIE. This increased demand coincided with internal reorganisation at NFER which directly affected EMIE, and staffing changes have also occurred. The overall effect is that after a difficult period EMIE is now hopefully better placed to provide information services to Education Officers and Advisers in LEAs.

A new Information Research and Development Department was opened by the Foundation in April. This Department is headed by the EMIE Project Leader and includes both EMIE and the European sister-project EPIC, the Education Policy Information Centre (see page 5).

EMIE ABSTRACTS

One effect of the changes referred to above has been a delay in the publication of EMIE education management abstracts, the fifth issue of which appeared in July. The cycle of occasional 'special abstracts bulletins' on specific topics was continued with the second issue of Special education : Education Act 1981 in March.

Both these publications, which are intended for use by Education Officers and Advisers only, can be obtained from EMIE link people in LEAs, or direct from EMIE.

OPEN DAYS

The first three EMIE open days for link people in LEAs were reported in the last Newsletter. These were judged sufficiently successful for two further open days to be held in February.

A total of 54 participants took part in the five events, which gave opportunities to discuss EMIE activities and to examine aspects of the service more closely.

USE OF COMPUTERS FOR ADMINISTRATION

The report of the questionnaire survey, conducted last year, of the Administrative use of computers by local education authorities has been well received and was featured in Patrick Bird's keynote address to the conference on 'School administration and the computer' organised by the University of Oxford Delegacy of Local Examinations and the Scottish Schools Computer Administration and Management Project in April. A paper based on the survey was presented by the Project Leader to the LAMSAC (Local Authorities Management Services and Computer Committee) national conference in March.

SEO INDUSTRY COMMITTEE

EMIE staff have continued to be involved with this Committee by editing and publishing the SEO Industry Committee newsletter, the third issue of which appeared in April. Discussion of the Committee's information requirements has led to agreement by Committee members to participate in a Delphi forecasting activity later this year. This will involve attempting to predict how various issues are likely to affect future education-industry activities. EMIE staff will administer the programme which will also involve a small number of experts drawn from outside the SEO network. Financial support for administering this programme will be provided by the NFER.

What we hope has become a fruitful collaboration with the SEO Industry Committee was made possible by the support and enthusiasm of Brian Kington, who recently returned to his post at IBM after a two-year secondment to the SEO. A successor to Dr. Kington as SEO Education Industry Liaison Officer is now being sought.

Copies of the SEO Industry Committee newsletter and information about the Delphi forecasting method can be obtained from EMIE.

INFORMATION WORKSHOPS

Two information workshops were held in January and February for participants in the two Professional Assistants' courses organised by the SEO last summer. These sessions were run by Professor Tom Wilson of Sheffield University and the Project Head. They looked at some of the problems encountered in making use of information in Education Departments.

Another series of one-day workshops has continued, this time focussed on problems in managing the introduction of information technology into LEAs. A joint event was organised by the South East and East Anglian regions of SEO with EMIE in May and a special workshop for staff of Buckinghamshire and Hertfordshire LEAs followed in June. An attempt to 'export' the idea to other SEO regions is now being made; a set of papers outlining the rationale and organisation of the IT workshops has recently been prepared by Derek Foreman of ILEA and the EMIE staff, drawing upon experience of running these workshops over two years.

Information technology workshops for education officers published by the SE Regional Training Committee of SEO, can be obtained on loan from EMIE.

SEO DOCUMENTS

A leaflet summarizing Recent SEO documents was published for the third successive year in June. It covers such topics as probation for new Heads, records of achievement for school leavers, police liaison, and adult training.

Available to SEO members from: Roy Harding, General Secretary, Society of Education Officers, 5 Bentinck Street, London W1N 5RN, tel. 01-487-4992, or from EMIE.

INDEPENDENT EVALUATION

Staff in twenty-three LEAS were asked in February to contribute their views on EMIE and to describe their experience of using the service. The replies were consolidated and edited into an independent report on the Project by Deborah Greig, a freelance journalist. She concluded that:

> "From the evidence of this independent enquiry it is quite clear that Local Education Authorities are overwhelmingly in favour of a continuing and expanded role for EMIE in the future. They are impressed with what the staff at Slough have achieved, and many are already coming to view the services as invaluable."

This evaluation was organised by Margaret Sproat, one of the EMIE Consultants.

Copies of LEA independent evaluation of EMIE by Deborah Greig, were sent to all LEAs in England and Wales in July. Further copies can be obtained from EMIE.

WORK WITH CONSULTANTS

Current or recent themes which have involved the five EMIE Consultants include the development of tertiary colleges, in-service training of teachers and curriculum appraisal. Brian Kay is preparing a paper incorporating the Consultants' views on the role and potential future of EMIE Consultants.

A Consultants' report Implementation of the Education Act 1981 by Fred Adams, was distributed to all LEAs in March. A further report, concentrating on issues relating to post-sixteen provision, is being prepared. Michael Johnson surveyed recent publications relating to Records of achievement for school leavers (April), and John Hudson provided a commentary on Financial devolution to schools (February) based on documents received by EMIE.

Copies of Consultants' reports and commentaries are available to Education Officers and Advisers in LEAs only from EMIE.

LEA RESEARCH GROUP (LEARG)

The Group completed its first year of activity in June. Seminars were arranged on classification of impairment (London, December 1983) and on forecasting pupil numbers (Coventry, March). The second event was so heavily oversubscribed that a 'repeat performance' was arranged in Coventry in June. These seminars attracted Education Officers with research and planning roles, or with an operational interest in the topic under review, as well as Advisers concerned with the theme. The speakers have so far included LEA, DES, Inspectorate and NHS staff. The next workshop on 'The development and use of teacher data bases', will be held in Manchester on November 14th.

A questionnaire survey of LEA in-house research, development and planning activities was undertaken by EMIE for the Group in the early part of the year. The survey was intended to supply material for an LEARG-published directory and for the EMIE service. Over fifty LEAs have responded to the questionnaire and it is hoped that the directory will be sent to all LEAs later this year.

At the first annual general meeting of the Group held in London in June it was acknowledged that, as originally intended, LEARG should now become a self-help group and less dependent upon EMIE. The officers of the general committee for 1984-85 are: Laurie South (Humberside) Chairman; Pat Henshaw (Coventry) Honorary Secretary; and Andy Seaward (Isle of Wight) Honorary Treasurer.

A few copies of the report of the March Forecasting pupil numbers workshop are available from Pat Henshaw, Education Offices, Earl Street, Coventry, CV1 5RS, or from EMIE. A brief report of the December Classification of impairment seminar can be obtained from EMIE. Enquiries about the Group and its activities should be addressed to Pat Henshaw. Membership is open to all LEA Education Officers, Administrators and Advisers and is free at present.

SEO REGIONAL VISITS

Brief progress reports on EMIE have been made at regional meetings of the SEO in Wales (March), Midlands, Yorkshire and Humberside, East Anglia and North West (June), and South West (July). The EMIE team has been supported on these occasions by the Principal Project Adviser, George Cooke, and by the General Secretary of SEO, Roy Harding.

STAFF CHANGES

Mavis Froud, the EMIE Secretary since April 1982, moved to another position within NFER in February. Her place has been taken by Jeanette Robertson. After several months working in a temporary capacity, Merrilo McIntosh was appointed as Clerical Officer to the Project in January.

Jeff Griffiths joined the team in June as Information Development Officer. He was formerly Deputy Schools Officer to the London and Southwark Church of England Diocesan Boards of Education.

Although he has handed over the reins as General Secretary of SEO to Roy Harding (formerly CEO, Buckinghamshire), George Cooke continues to act as Principal Adviser to EMIE.

EPIC

The Education Policy Information Centre (EPIC) is the focus in England, Wales and Northern Ireland for the EURYDICE European education policy information exchange network. EPIC is based at the NFER and is being reorganised within the new Information Research and Development Department. The EMIE Project Leader took over as Head of EPIC in April; a new Senior Information Officer, Joanna Le Métais, took up her post in July.

Transition from school to adult and working life : a review of recent British and European initiatives, the 'European version' of the report referred to in the previous newsletter, was published recently by the EURYDICE Central Unit and is now available from EPIC. Other EPIC developments are anticipated.

Copies of the Transition from school to adult and working life review, and further information about EPIC/EURYDICE, can be obtained from Joanna Le Métais at the NFER address below.

INFORMATION FROM EMIE

Six copies of each issue of EMIE education management abstracts are sent to link people in LEAs for circulation. If you are not seeing EMIE abstracts and would like to do so please contact EMIE.

EMIE staff will try to respond to any enquiries on policy matters from Education Officers or Advisers.

To use the information service, simply contact Sue Taylor or Jeff Griffiths at EMIE, NFER, The Mere, Upton Park, Slough, SL1 2DQ, telephone Slough (0753) 74123.